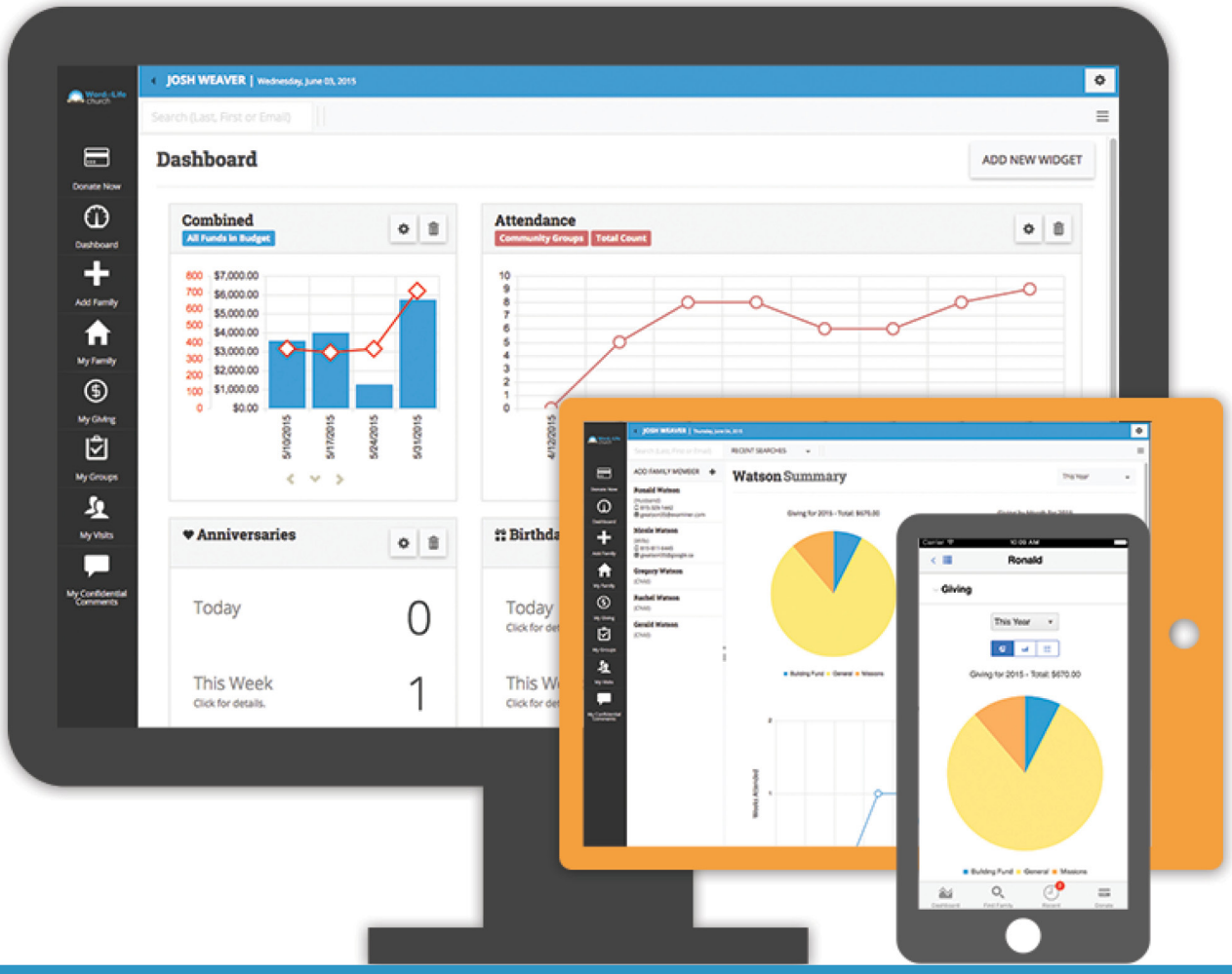
RollCall Connect v13

User Manual



BY THE BOOK
Software for Churches & Nonprofits

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SETTING UP ROLL CALL CONNECT

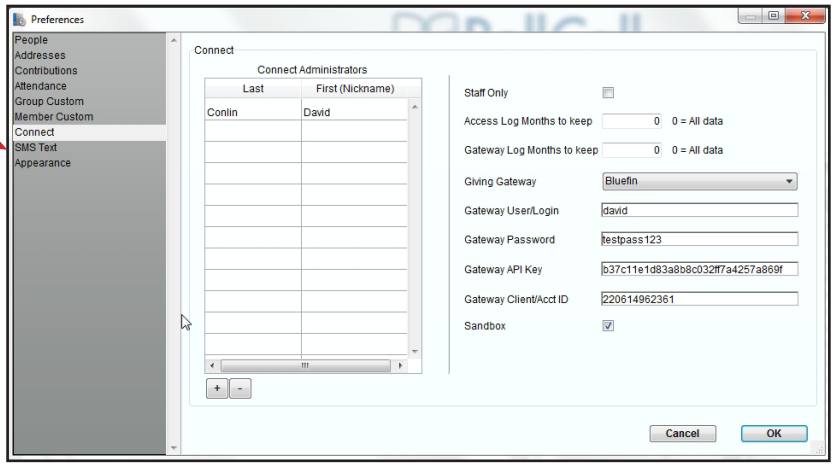
The Roll Call Connect user manual will walk you through setting up Roll Call Connect and using the web interface. This manual assumes you are already familiar with Roll Call. For more information on installing Roll Call, entering people, contributions or groups, see the Roll Call User Manual

Roll Call Preferences

There are several Roll Call Preferences that must be configured to use Connect. To navigate to the preferences area for Connect, do the following:

1. Log into Roll Call as Administrator or Director.
2. If you are on a Mac, select ROLLCALL> Preferences. If you are on Windows, select Edit>Preferences from the top menu.

From preferences window, highlight Connect.



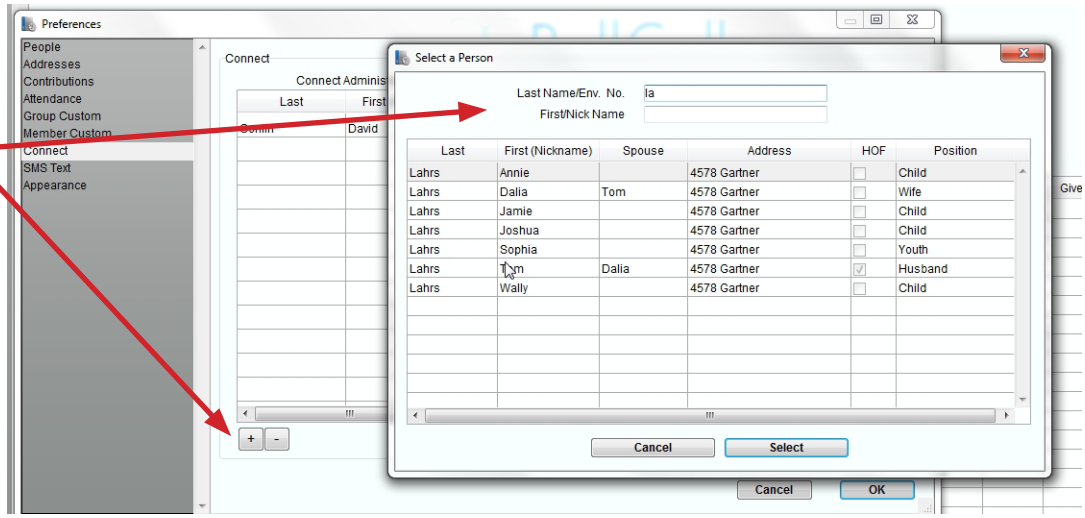
3. Click on the Connect link of the left sidebar menu.

Roll Call Connect Administrator

The first preference is the Connect Administrator. The Connect Administrator is the user that will manage the look and feel of Connect, what fields will be displayed, and the staff permissions. To set the Administrators, do the following:

1. On the left side you should see an area for Connect Administrators. Click on the plus sign underneath that area.

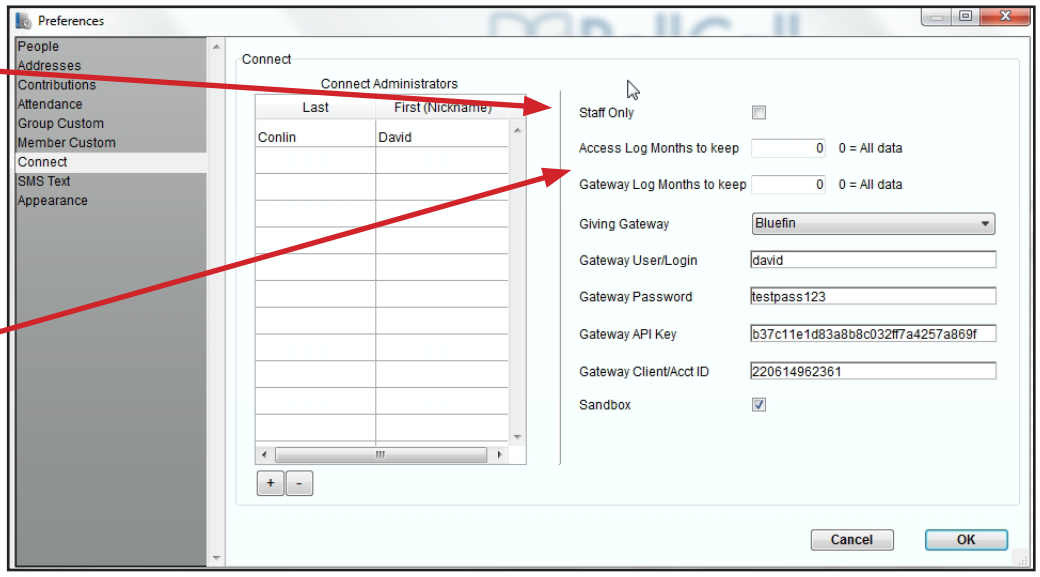
Click the plus sign to add a Connect administrator. Then enter last name and pick from the list.



2. Enter the *Last Name* of the Administrator. Pick the appropriate person from the list.
3. Click OK in the lower right to save this information.

Mark if you only want staff members to use Connect.

Inidcate how many months to keep logs.



Staff Only

If you only want staff members, not the congregation, to have access to Roll Call information, you'll need to mark the *Staff* checkbox to set this preference.

Access/Gateway Logs

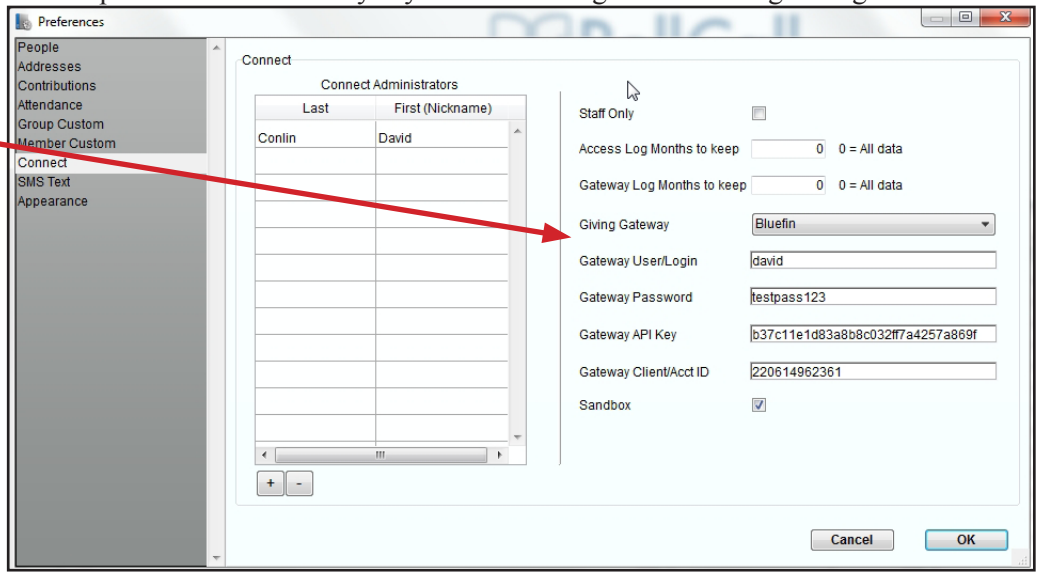
Roll Call will record in the access logs each time a person logs into Roll Call Connect. It is up to you to decide how long you wish to maintain those logs. If you leave this preference as 0, access information will never be deleted. If you set this preference to 2 for example, it will keep 2 months of access information.

Roll Call will also track the people that access the gateway for online giving. It is up to your church to decide how long you wish to maintain this access information. If you leave this preference as 0, gateway logs will never be deleted. If you set this preference to 3, for example, Roll Call will maintain 3 months of gateway logs.

Giving Gateway

The next preference is necessary if you will be using Online Giving through Roll Call Connect.

Enter giving gateway information.



To set up this gateway information, do the following:

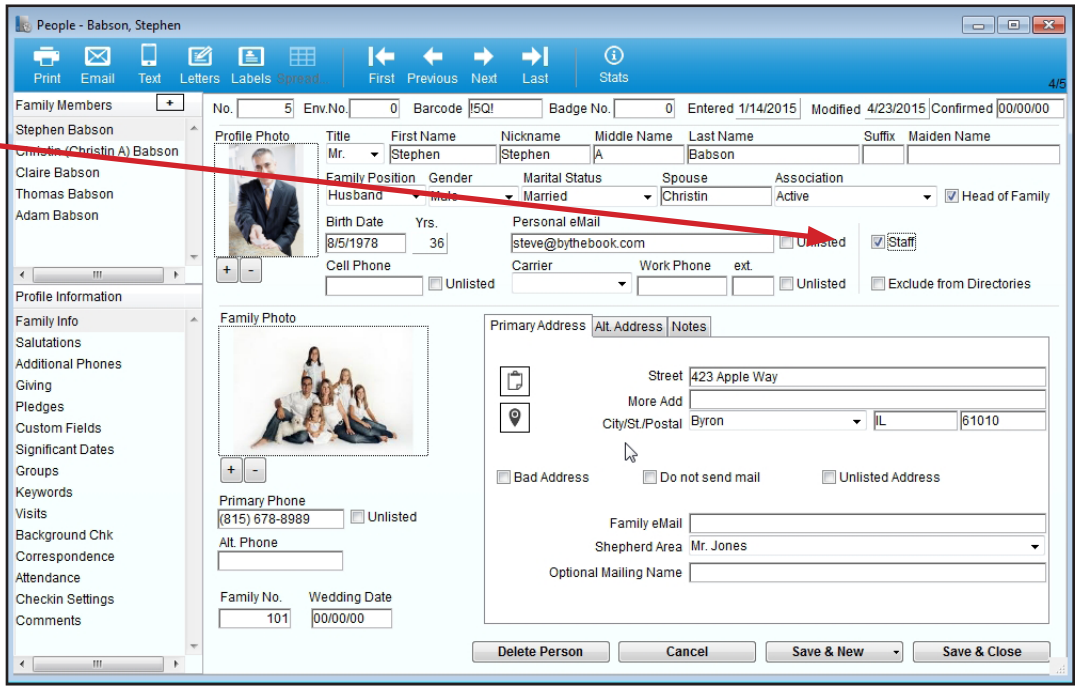
1. On the right side of the preference window you'll notice the fields for the Giving Gateway information. Use the drop down to select your churches *Online Giving Provider.*
2. Enter your *Gateway Username.*
3. Enter the *Gateway Password.*
4. Enter the *Gateway API Key* provided to your church.
5. If you will be using the merchant account sandbox to test things out, click on the *Sandbox* checkbox. Make sure to uncheck this, when you want to go live.
6. Click OK to save this information.

Profile Settings

There are several key pieces of information that will need to be set in the People profile screen. If a person is on staff at the church, you will want to check the box for *Staff*. This will give them access to additional functionality in Roll Call Connect.

1. Log into Roll Call as Administrator or Director.
2. Expand the People menu.
3. Click on Search Profiles.
4. Enter the *Last Name* of a staff member and double click on their record.

Mark the box for staff, for staff members that will be using Connect.



5. Mark the checkbox for *Staff.*
6. The system will ask if you want to make this person a Connect Administrator. Answer yes or no.
7. Click SAVE & CLOSE to save this information.

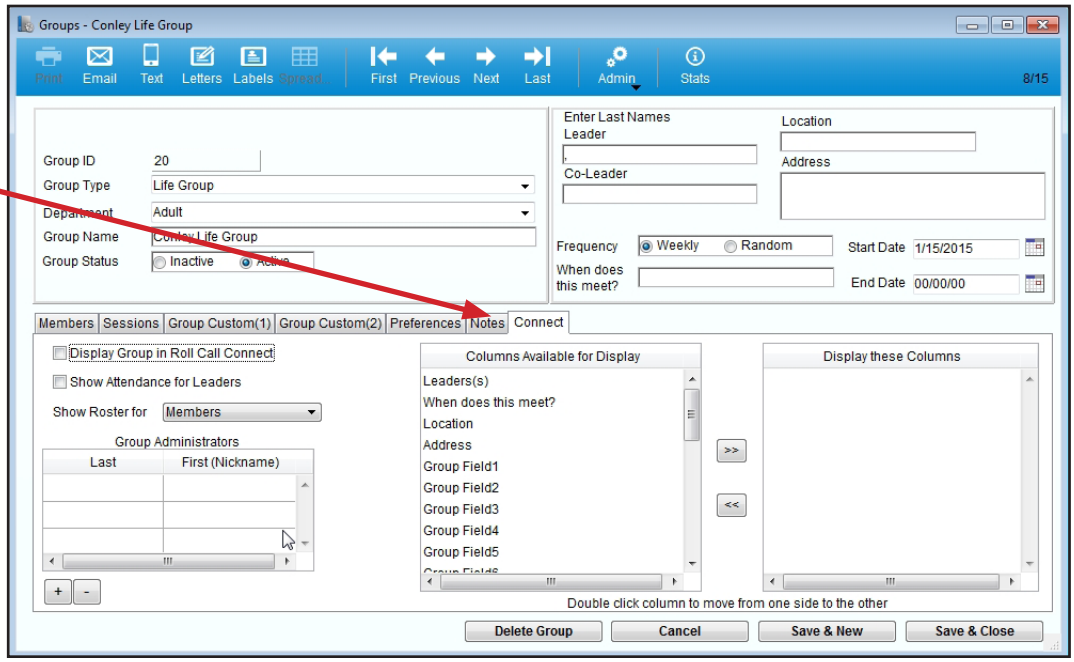
The other piece of vital information in a person's record is their personal email address. The email address will be used as the username for anyone to log into Connect. Confirm that personal email addresses are present and valid for all folks that wish to use Connect. Also, make sure there are not 2 or more people that use the same email address.

Group Settings

If you'd like group information to be available in Connect, there are some settings in the Group screen that must be configured. To configure a group, do the following:

1. Log into Roll Call as Administrator or Director.

From within the Group, click on the Connect tab for group specific settings.



2. Expand the Groups menu.
3. Click on Search menu item underneath Groups.
4. Double click on the specific group you wish to configure.
5. Click on the Connect tab.

Each group setting is outlined below.

Display Group

If you would like the group to be displayed in Connect, mark the box for *Display Group in Roll Call Connect*.

Show Attendance for Leaders

By default, the only Connect user that can view and record group attendance is the group administrator. If you would like the group leader to also be able to view and record attendance for the group, mark the box for *Show Attendance for Leaders*.

Show Roster For

Choose who you would like to be able to view the entire group roster. Use the drop down to choose Members or Leaders Only.

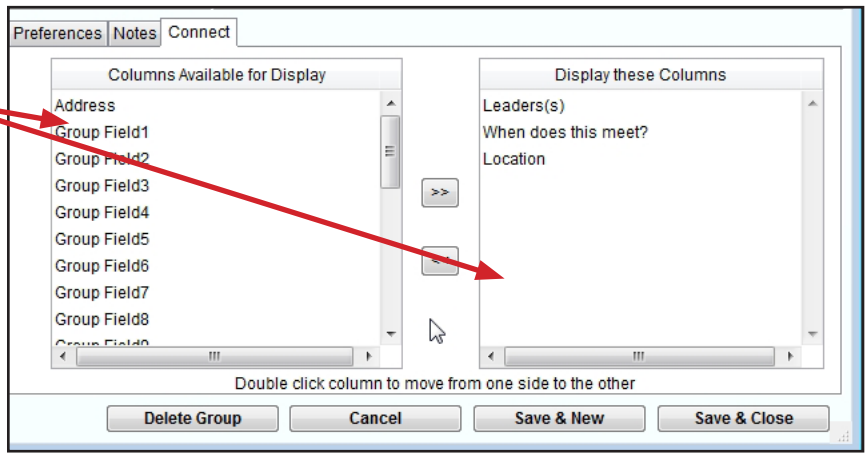
Group Administrators

Group administrators can view group rosters and also record attendance for the groups they administer. To add a group administrator do the following:

1. Log into Roll Call as Administrator or Director.
2. Expand the Groups menu.
3. Click on Search menu item.
4. Double click on the specific group you wish to configure.
5. Click on the Connect tab.
6. Click on the plus sign under the Group Administrator area.

7. Enter the *Last Name* of the Administrator.
8. Select the appropriate person from the list.
9. Click SAVE & CLOSE in the lower right.

Click on a column name from left side to move it to the display column.



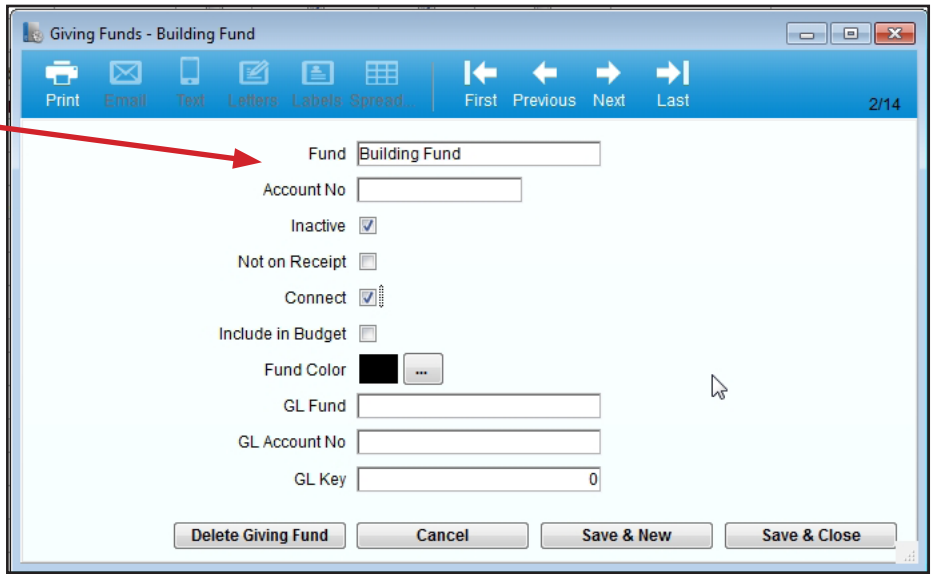
Columns Available for Display

Use this area to select the group information that is displayed on the Detail tab. To include a column, click on the name from the left side to move it to the *Display these Columns* side.

Giving Fund Settings

If you will be opening up Roll Call Connect for online giving, you will need to set some

At a minimum the Fund name must be entered.



preferences in the Giving Fund area. This allows you to set which funds you will allow people to contribute to through your online giving system.

To configure your Giving Funds, do the following:

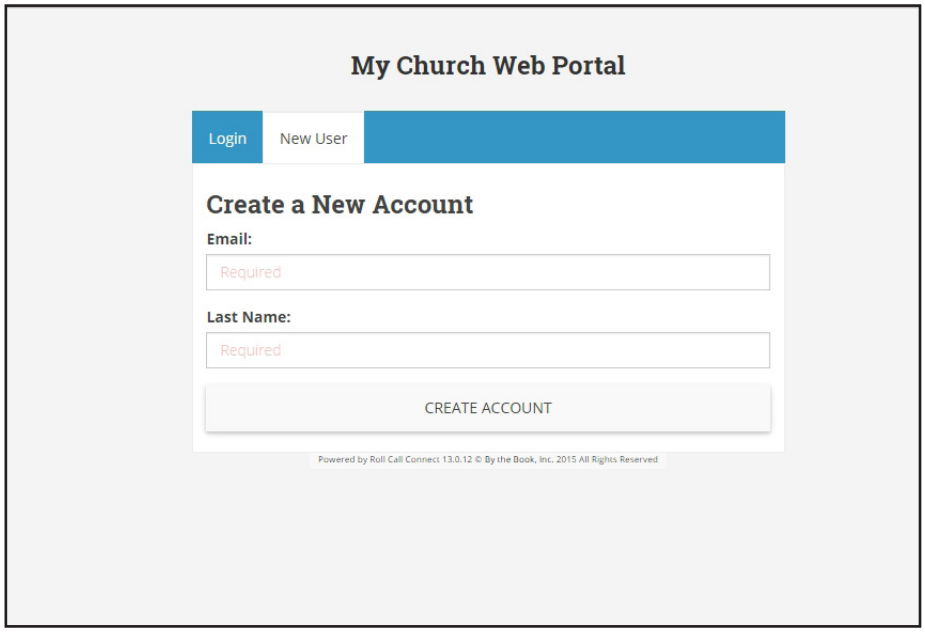
1. Expand the Contributions menu.
2. Click on Giving Funds.
3. Double click on one of your existing Funds, or click the plus sign to add a new fund.

4. Mark the box for *Connect*, if you'd like donors to be able to contribute to that fund through online giving.
5. Mark the box for *Include in Budget*, if this is a fund that should be counted toward the total giving amount.
6. Click SAVE & CLOSE.

Login Account

To begin using Roll Call Connect, you must create a Login Account. To access the login screen, open the browser on your computer or mobile device. Enter the IP address of your Roll Call Server machine as the URL. For example, http://your-ip-address.

1. Click on the NEW USER tab.



2. Enter your *Personal Email* address.
3. Enter your *Last Name*.
4. Click SUBMIT.
5. You will receive an email at the address entered in step 2, that will allow you to set a password.
6. Click on the link in the email. It will take you to a page to set your password.

You are now ready to log in and start using Connect.

Connect Settings

Before you open up Roll Call Connect to your staff and congregation, the Roll Call Connect Administrator should configure the Connect Settings. These settings will affect appearance of the web pages, what information will be displayed and who will have access to what information.

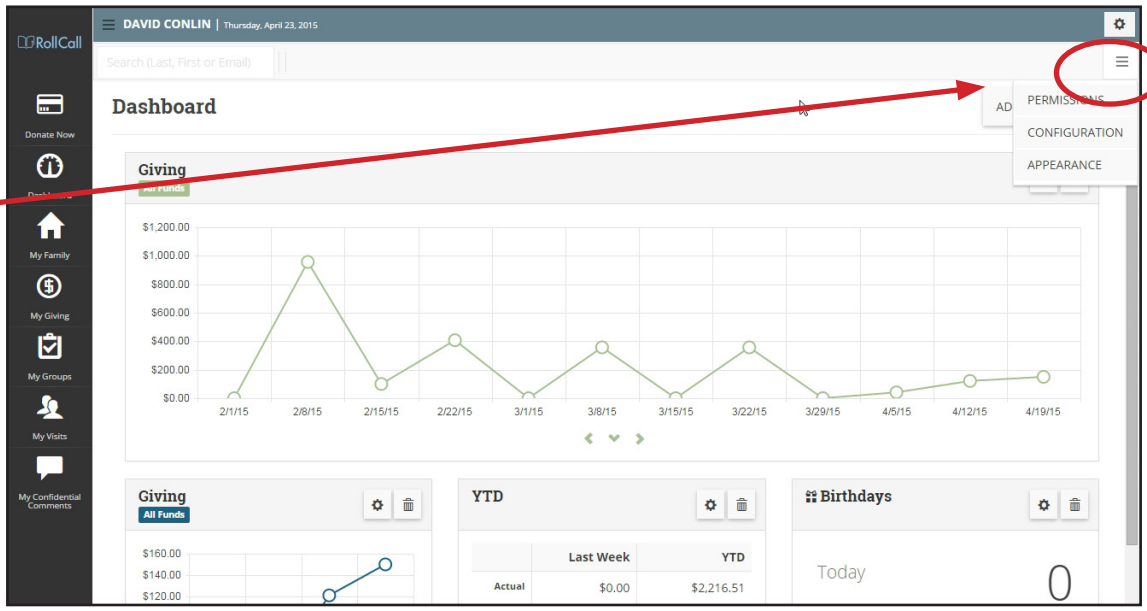
To begin the configuration process, do the following:

1. Open the browser on your desktop or tablet.
2. Get to the login screen, by entering the ip address of your Roll Call Server machine, as the web address (URL) in your browser.
3. Enter the email address and password then tap LOGIN.
4. Click on the hamburger menu in the upper right.

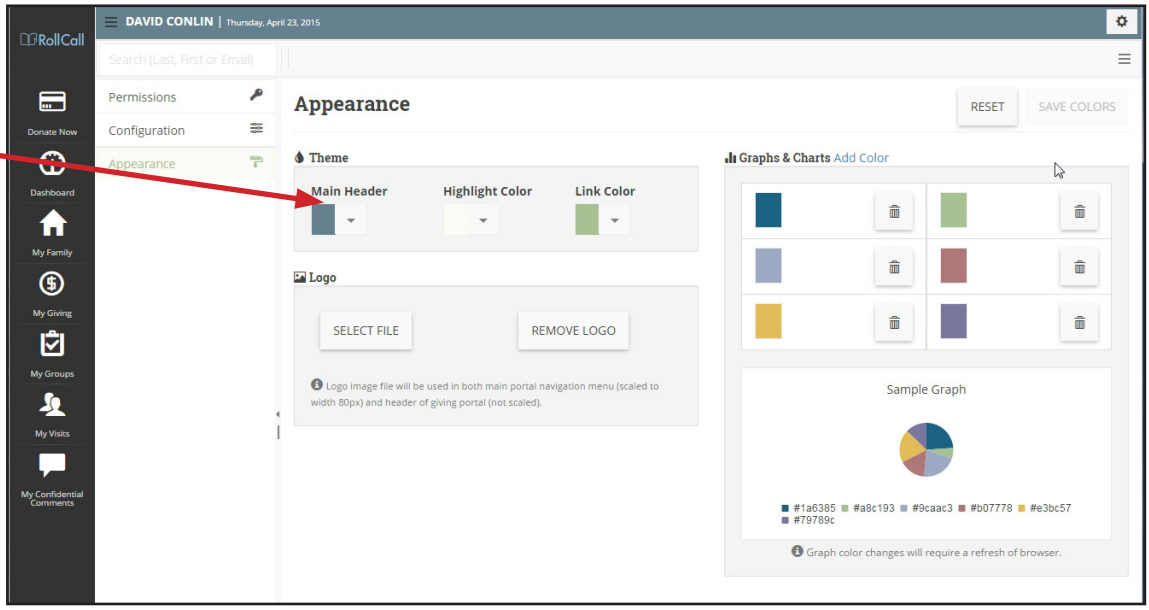
Appearance

The appearance settings will affect how the web pages look. To configure this:

Click on hamburger menu to get settings menu.



Use the drop down to choose your colors.



1. Choose Appearance from the menu.
2. In Theme area:
    a. Use the drop down to choose the color you'd like as the *Main Header*. The Main Header is the bar across the top of the web page.
    b. Use the drop down to choose the color for your *Highlight Color*. The highlight color is the color used to highlight a menu or line item.
    c. Use the drop down to choose the color for the *Link Color*. Any hyper-links on the web page will be in the *Link Color*.
3. In the Logo section, click or tap the SELECT FILE button to import your organization's logo. The graphic should be 200 pixels X 75 pixels. To remove a previously used logo, click or tag the REMOVE LOGO button.
4. In the Colors section there will be 6 default colors defined. These colors will be used for the graphs displayed throughout Roll Call Connect.
    a. To remove any of these colors, tap or click the trash can icon.

b. To add a new color, click on the link "Add Colors", then use the drop down box to select the color.

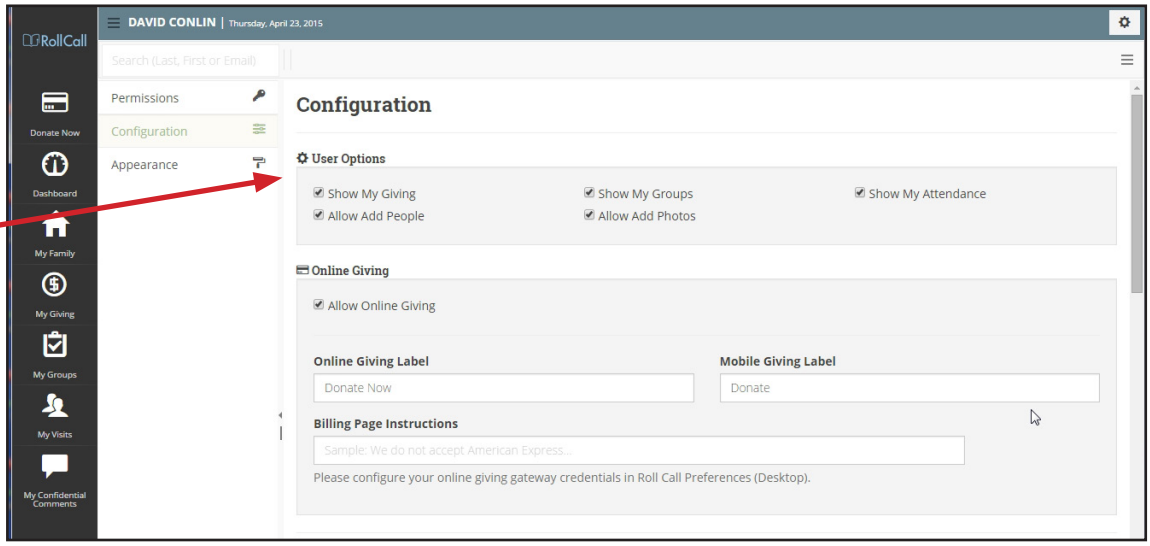
Click the SAVE COLORS button once you have marked the Appearance settings.

Configuration

The configuration section allows you to choose what information will be available for your connect users. To modify this information:

1. In the User Options section:
    a. Mark the *Show My Giving* checkbox, to allow the user to view their giving history in Connect.
    b. Mark the *Show My Groups* checkbox, to allow the users to view their group involvements in Connect. Please note that only groups that have the preference to "Display in Connect" will be available for the user to see.
    c. Mark the *Show My Attendance* checkbox to allow the users to view their attendance

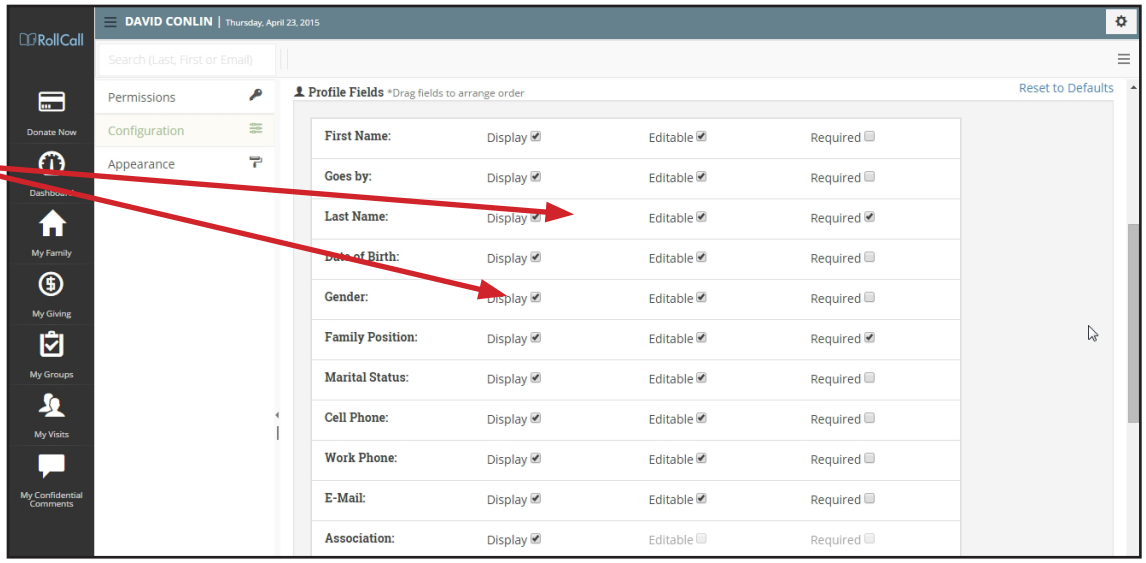
Choose the information or sections that you'd like available for your connect users.



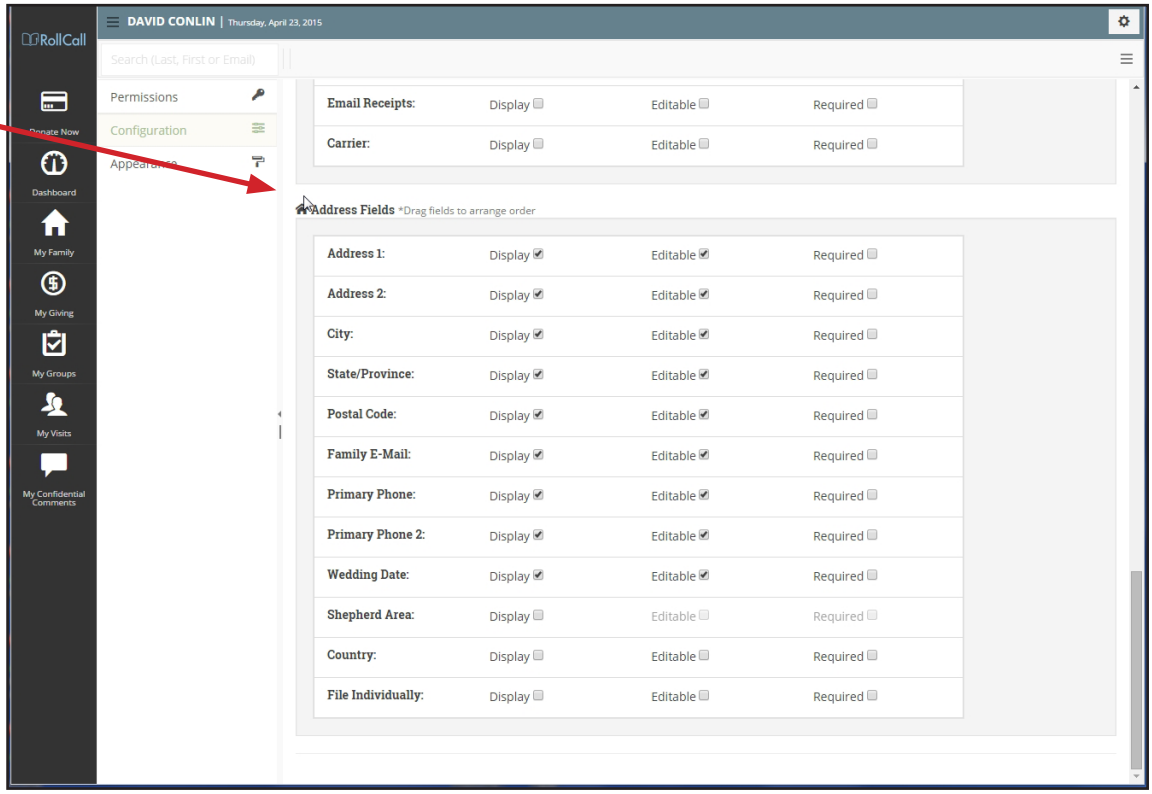
data.

    d. Mark the box to *Allow Add People* to allow users to add family members to their family.
    e. Mark the box to *Allow Add Photos* to allow the user to upload a picture to their profile.
2. In the Online Giving section:
    a. Mark the box to *Allow Online* giving if you are accepting online gifts through Roll Call Connect.
    b. If you are accepting online contributions, enter the words you'd like displayed on the button in the *Online Giving Label*. The default is "Donate Now".
    c. If you are accepting online contributions, enter the words you'd like on the button in the *Mobile Giving Label* (for smart phones). The default is "Donate"
3. In the Profile Fields section:
    a. Mark the box for *Display* each field you'd like displayed on the Profile page.
    b. Mark the box for *Editable* for each field you'd like the user to be able to change.
    c. Mark the box for *Required* for each field that you'd like to be mandatory.
    d. Drag and drop the field to the position you'd like them displayed on the web page.
4. In the Address Fields section:
    a. Mark the box for *Display* each field you'd like displayed on the Profile page.
    b. Mark the box for *Editable* for each field you'd like the user to be able to change.

For each field, check if the field should be displayed, editable and required.


DAVID CONLIN | Thursday, April 23, 2015
Permissions
Configuration
Appearance
Profile Fields *Drag fields to arrange order
Reset to Defaults
First Name: Display Editable Required
Goes by: Display Editable Required
Last Name: Display Editable Required
Date of Birth: Display Editable Required
Gender: Display Editable Required
Family Position: Display Editable Required
Marital Status: Display Editable Required
Cell Phone: Display Editable Required
Work Phone: Display Editable Required
E-Mail: Display Editable Required
Association: Display Editable Required

As you scroll down the page, you'll come to the address section. Mark the fields as view, editable and required.


DAVID CONLIN | Thursday, April 23, 2015
Permissions
Configuration
Email Receipts: Display Editable Required
Carrier: Display Editable Required
Address Fields *Drag fields to arrange order
Address 1: Display Editable Required
Address 2: Display Editable Required
City: Display Editable Required
State/Province: Display Editable Required
Postal Code: Display Editable Required
Family E-Mail: Display Editable Required
Primary Phone: Display Editable Required
Primary Phone 2: Display Editable Required
Wedding Date: Display Editable Required
Shepherd Area: Display Editable Required
Country: Display Editable Required
File Individually: Display Editable Required

c. Mark the box for *Required* for each field that you'd like to be mandatory.
d. Drag and drop the field to the position you'd like them displayed on the web page.

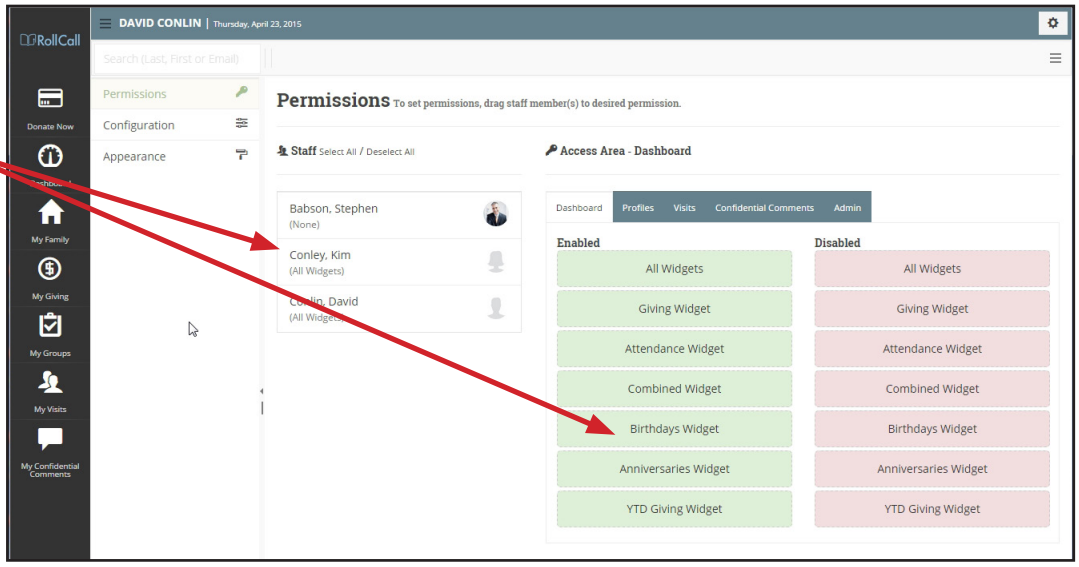
Click the SAVE button once you marked the appropriate configuration options.

Permissions

The permissions section allows you to configure what information staff members will be able to access through Roll Call Connect. The individuals marked in your Roll Call database as staff will be listed on the left side of the page. The right side of the page contains the specific permissions.

1. On the **Dashboard** tab:
   a. Drag the name of the staff member onto the permission you'd like to assign to that person. You may highlight one or more staff members at a time, then drag and drop onto the Enabled or Disabled box.

Drag one or more staff members names onto the widget they are allowed to use.



b. *All Widgets* gives the staff member access to all dashboard reports.

c. *Giving Widget* gives the staff member access to the weekly giving totals report. This graph displays all giving by week. It can be configured by fund as well.

d. *Attendance Widget* gives the staff member access to the attendance report. This report outlines the headcount for all attendance by week. It can be configured to display only group or service attendance. It can also be configured to display only attendance for certain departments.

e. *Combined Widget* gives the staff member access to a report which graphs both attendance and giving data.

f. *Birthdays Widget* gives the staff member access to a list of folks who have an upcoming birthday.

g. *Anniversaries Widget* gives the staff member access to a list of folks who have an upcoming anniversary.

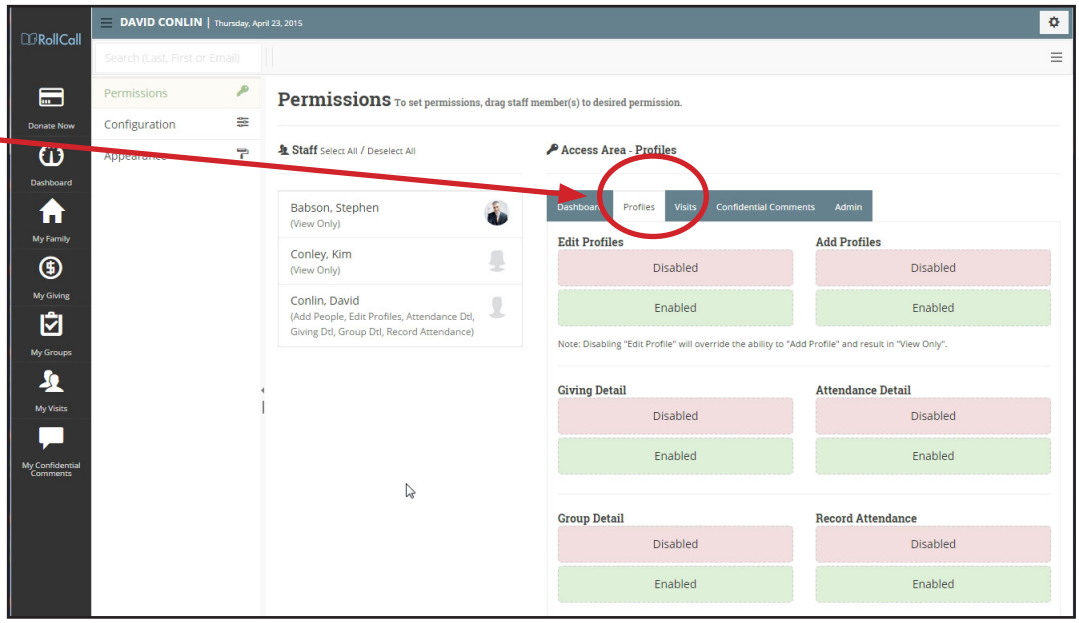
h. *YTD Giving Widget* gives the staff member access to a report that outlines actual giving vs. budget.

2. On the **Profiles** tab:

   a. Drag the name of the staff member onto the permission you'd like to assign to that person. You may highlight one or more staff at a time, then drag and drop to the Enabled or Disabled box.

   b. *Edit Profiles* – drag the staff members name to the Enabled box under Edit Profiles if

From the profile tab, drag the staff person's name onto the priv-eleges they are assigned to.

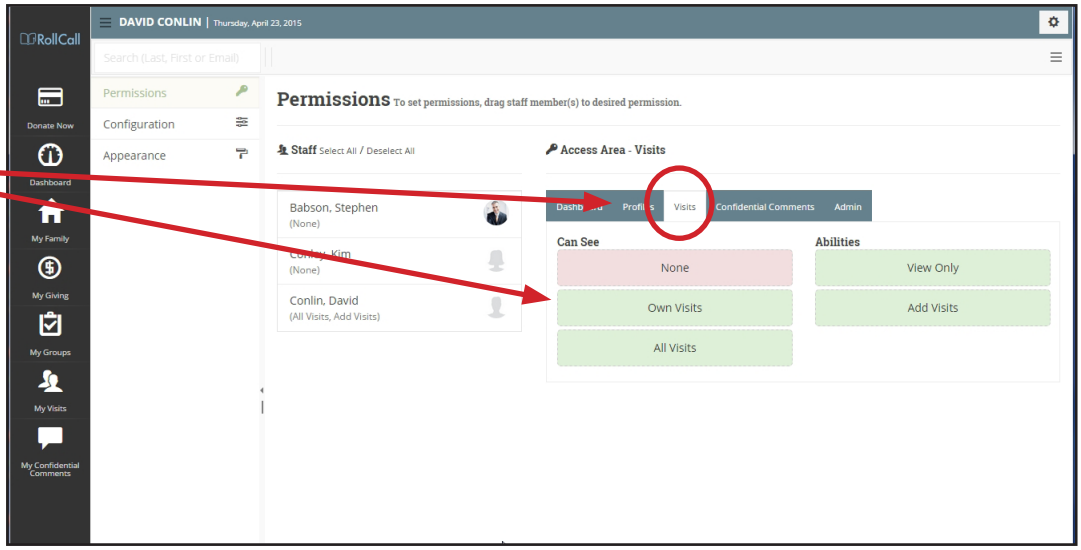


you'd like them to be able to update profile information.

c. *Add Profiles* – drag the staff member's name to the Enable box under Add Profiles if you'd like them to be able to add members to a family.
d. *Giving Detail* – drag the staff member's name to this permission if they are allowed to view contribution detail for the congregation.
e. *Attendance Detail* – drag the staff member's name to this permission if they are allowed to view attendance detail for the congregation.
f. *Group Detail* – drag the staff member's name to the Enabled box under Group Detail if they are allowed to view group detail information.
g. *Record Attendance* – drag the staff member's name to the Enabled box under Record Attendance if this person is allowed to record attendance.

3. On the **Visits** tab:
   a. Drag the name of the staff member onto the permission you'd like to assign to that person.
   b. *Can See* – drag the staff name to the *None* box if this staff member is not allowed to view any visitation information. Drag the staff name to the *Own Visit*s box if the user

From the visits tab, drag the staff members name to the actions they can perform.



is limited to viewing the visits they entered. Drag the staff name to the *All Visits* box if the user is allowed to view all visitation records.

c. *Abilities* – drag the staff name to the *View Only* box if the user is only allowed to view visitation information. Drag the staff name to the *Add Visits* box if this person is allowed enter visitation comments.

4. On the **Confidential Comments** tab:
   a. Drag the name of the staff member onto the permission you'd like to assign to that person.
   b. *Can See* – drag the staff name to the *None* box if this staff member is not allowed to view any confidential comment information. Drag the staff name to the *Own Comments* box if the user is limited to viewing the comments they entered. Drag the staff name to the *All Comments* box if the user is allowed to view all confidential comment records.
   c. *Abilities* – drag the staff name to the *View Only* box if the user is only allowed to view comment information. Drag the staff name to the *Add Comments* box if this person is allowed enter confidential comments.

5. On the **Admin** tab:
   a. Drag the name of the staff member onto the *Regular Staff* box, if this person will not be the Connect Administrator.

b. Drag the name of the staff member onto the *Connect Administrator* box, if this person will be the Roll Call Connect Administrator. The Administrator is the only use that can set the permissions, configuration and appearance of Roll Call.

USING CONNECT TABLET/DESKTOP CONGREGATION

Members of your congregation will be able to do the following in Roll Call Connect

1. View and update their contact information.
2. View their giving history.
3. Make online contributions.
4. View groups they are involved in.
5. View a roster of group members.
6. Record attendance for a group if they are the leader or administrator for that group.

Based on your church's Roll Call settings some of these functions may not be available.

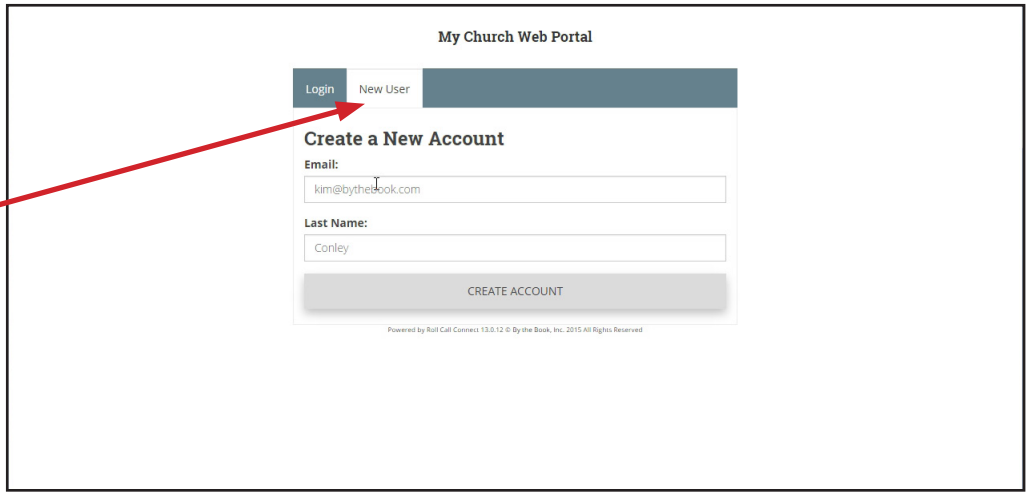
Logging into Roll Call Connect

To access Roll Call Connect, the user must login from a web browser. The URL for the login page will be the ip-address of the Roll Call Server machine followed by "/co", for example http://your-ip-address/co. Ideally that ip address will be fixed and you'll have a "Login" link on your website pointing to that page.

If you have not created a Connect account yet, you'll need to do that:

1. Click on the NEW USER tab.
2. Enter your *Personal Email* address.
3. Enter your *Last Name*.
4. Click SUBMIT.

From the New User tab, enter your email address and last name.



5. If the system finds a match between that email address and last name, you will receive an email with a link to set your password.
6. If the system does not find a record in Roll Call with that email and last name, the user will be prompted for additional information. After this information is filled out and submitted, the user will be sent an email with a link to create a password.
7. From your email program, click on the link in the email. It will take you to a page to set your password.

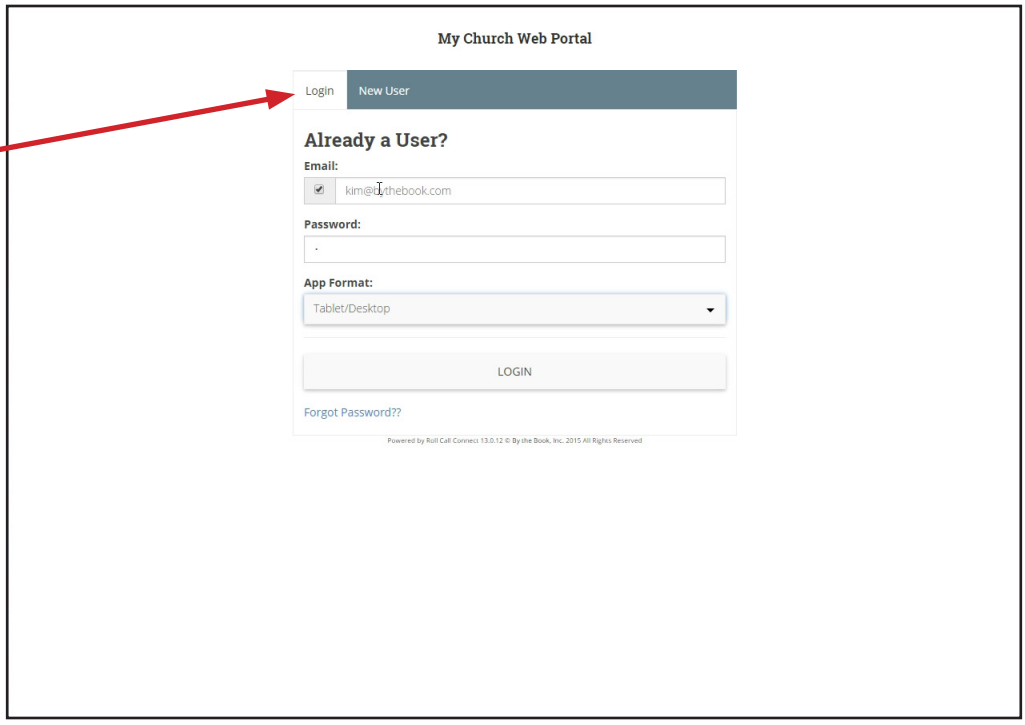
You are now ready to log in and start using Connect.

To log into Connect, do the following:

1. Make sure you are anchored on the Login tab.
2. Enter your *User Name* (email address).

3. Enter your *Password.*
4. Choose the *App Format* (Desktop/Tablet).
5. Click LOGIN.

From the login tab, enter your username and password.



Forgot Password

If you have created a Connect username, but have forgotten your password, simply click on the *Forgot Password* link from the login screen. You'll be prompted to enter your email address and last name. Enter that information and click SEND LINK. An email will be sent with a link to update your password.

Change Password

If you would like to change your password:

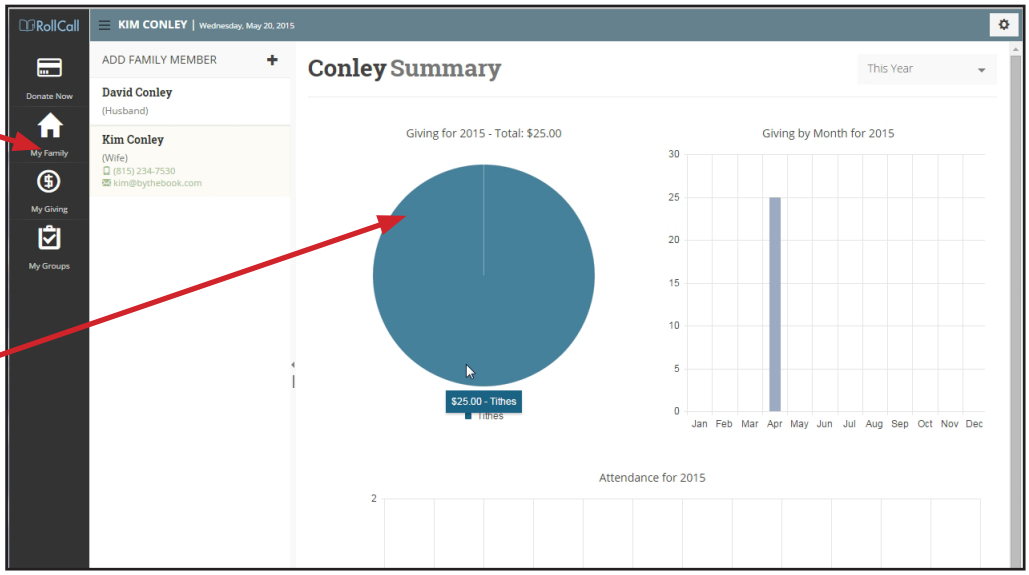
1. Log into Connect.
2. From the Gear button in the upper right of the page, click on the *Change Password* link.
3. Enter a new password.
4. Enter the new password again in the *Confirm* box.
5. Click CONFIRM button.

Home Page

Once you have logged into Connect, you'll be anchored on the "Home" page. This page will display up to 3 graphs:

1. The giving pie chart will outline total giving for this year. Each slice of the pie will represent giving to a specific fund.
2. The giving bar chart will outline your total giving by month.
3. The attendance chart will outline your family's attendance by month.

Click on any of the points in the charts to view the detail information.



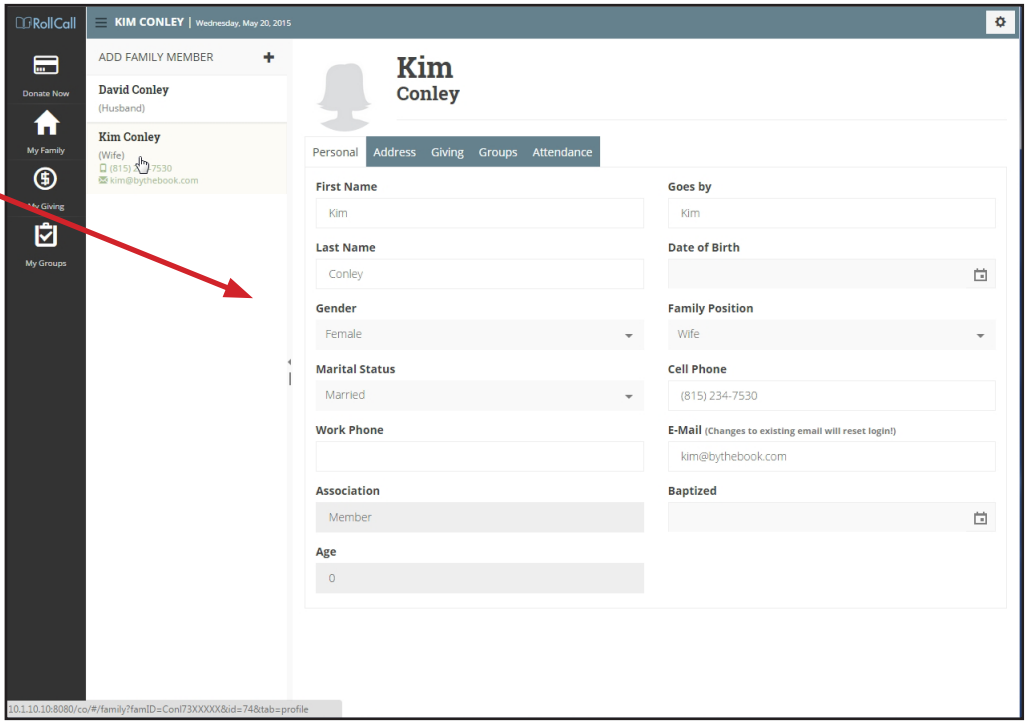
Profile Information

When you first log into Roll Call Connect or when you click on the MyFamily menu icon, the list of family members will be displayed just to the right of the menu bar. Click on any of the family members to view their details.

Update Profile/ General Information

To update the personal profile information:

1. Click on family members name.
2. Make sure you are anchored on the Personal tab.
3. Update the necessary information such as name, birthday, cell phone etc.
4. Click on the SAVE PROFILE button in the upper right.

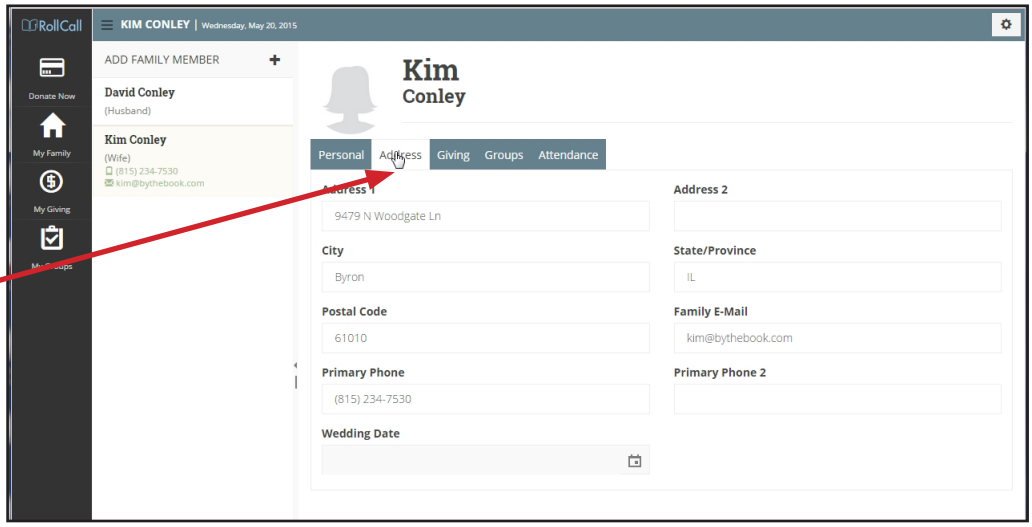


Update Address Information

To update the address or family type information:

1. Click on any family members name.
2. Click on the Address tab.
3. Update the necessary information such as address, home phone or family email address.
4. Click on the SAVE PROFILE button in the upper right.

From the address tab, you may change any of the address information.

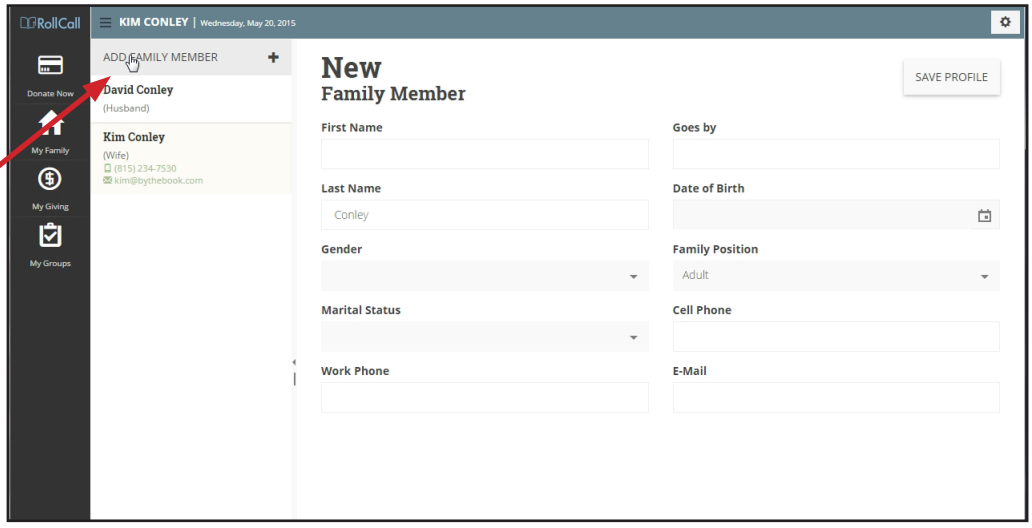


Add New Family Member

To add a new person to your family, do the following:

1. Click on the ADD FAMILY MEMBER button.
2. Enter the information about this person, name, gender, birthdate, etc.
3. Click SAVE PROFILE button in the upper right.

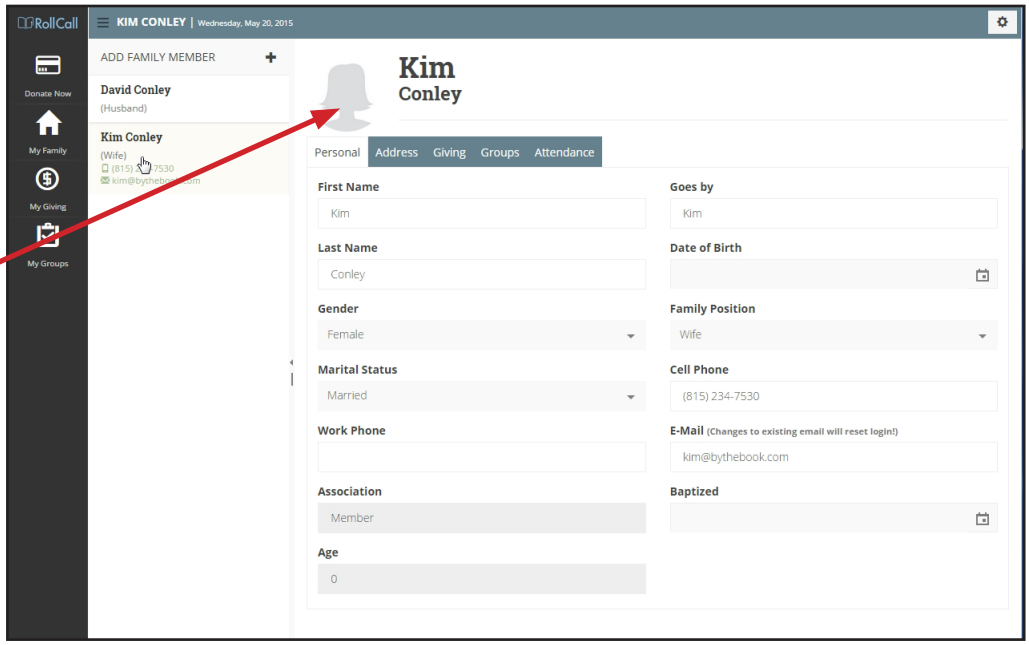
Click on ADD FAMILY MEMBER to add another person to this family.



Upload Picture

To upload a profile picture for a person in the family, do the following:

1. Click on the name of the family member for which you'd like to upload a picture.
2. Click on the head image to the left of the person's name.
3. Navigate to the image file you'd like to upload.
4. Click SAVE PROFILE button.



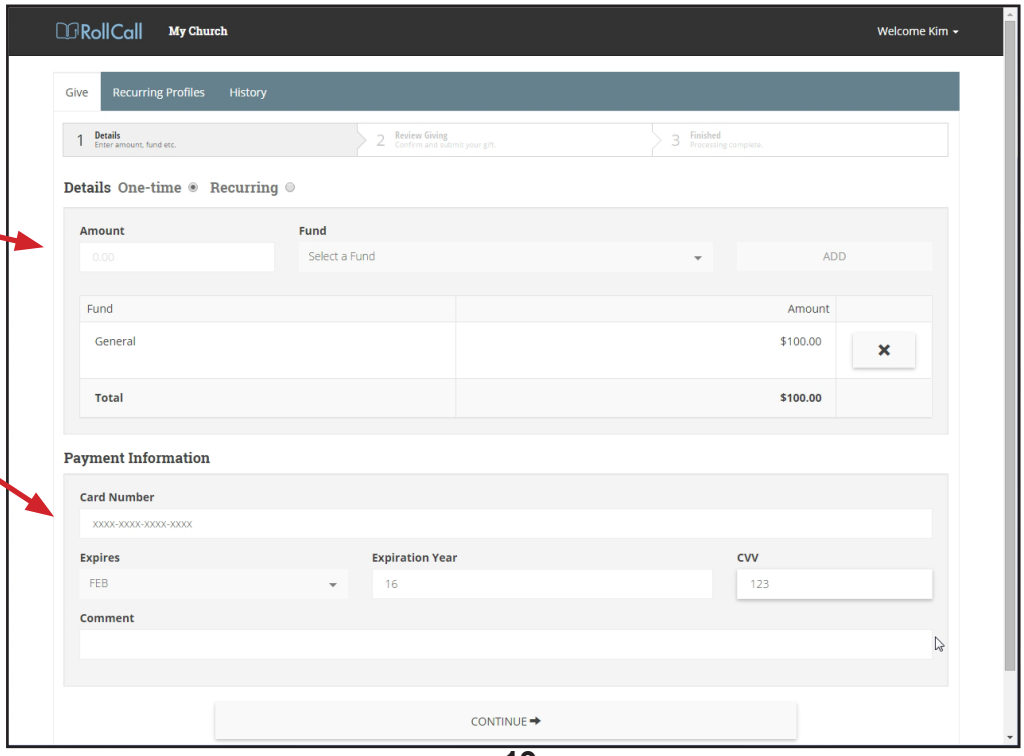
Contributions

When you first log onto Roll Call Connect, you will be anchored on the Home Page. This page can display 2 charts, which outline your giving. The pie chart summarizes how much was given this year by fund. The second chart summarizes your giving by month.

Give Online

To make an online donation, do the following:

1. Click on the Donate Now menu icon on the left sidebar.
2. Choose between a "one time" or "recurring" gift type
3. For "one time" gifts, enter the following information.
    a. Enter the *Amount* of the gift.
    b. Enter the *Fund* that the gift should be designated to.
    c. Click the ADD button.
4. For a "recurring" gift, enter the following information



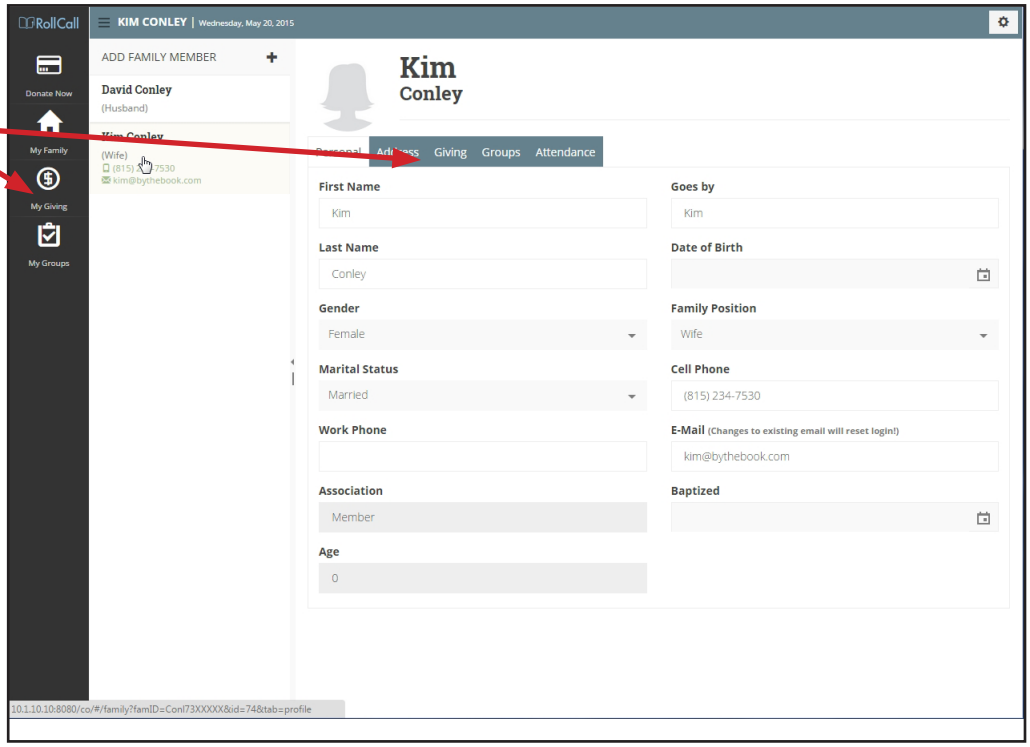
a. Select the *Schedule* type (when you want the gift to re-occur).
b. Enter the specific date if applicable.
c. Enter the *Start Date.*
d. Enter the number of times you'd like this gift to occur. Leave this field blank if there is no end date.
e. Enter the Amount of the gift.
f. Enter the Fund that the gift should be designated to.
g. Click the ADD button.

5. Once you've added all the gifts you'd like to, move on to the payment section.
6. Enter the *Card Number*.
7. Enter the *Expiration Month*.
8. Enter the *Expiration Year*.
9. Enter the *CSV code*.
10. Click CONTINUE.
11. At this point, you may review your online gift. If everything looks correct, click SUBMIT. If you need to make changes, click EDIT GIFT.

View Giving History

There are two methods to get to the giving history page. The first method would be to click on the MyGiving menu icon on the left side bar. The second option is from the profile page, click on the Giving tab.

Click on the Giving tab, or My Giving menu option.



On the giving history page, there will be 2 charts. The pie chart will summarize this year's giving information by fund. The bar chart summarizes the giving information by month. To change the view from "this year" to "last year", use the drop down box in the upper left corner.

Scroll down below the charts to view the detailed list of contributions.

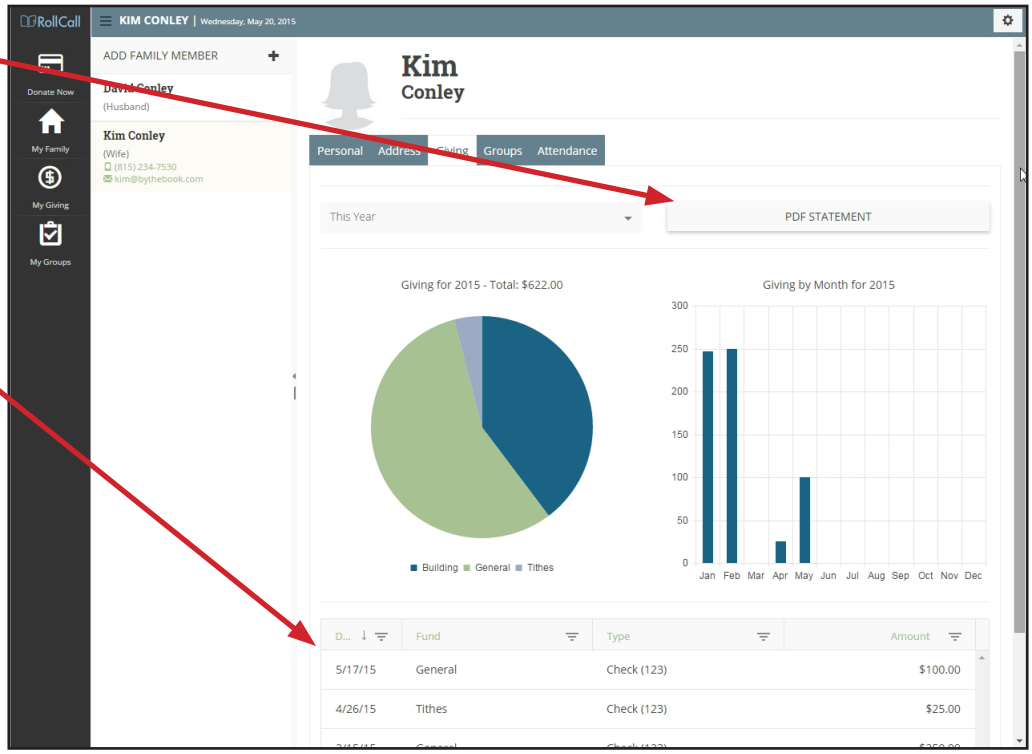
Print a Contribution Statement

To print a giving statement for "this year" or "last year", do the following:

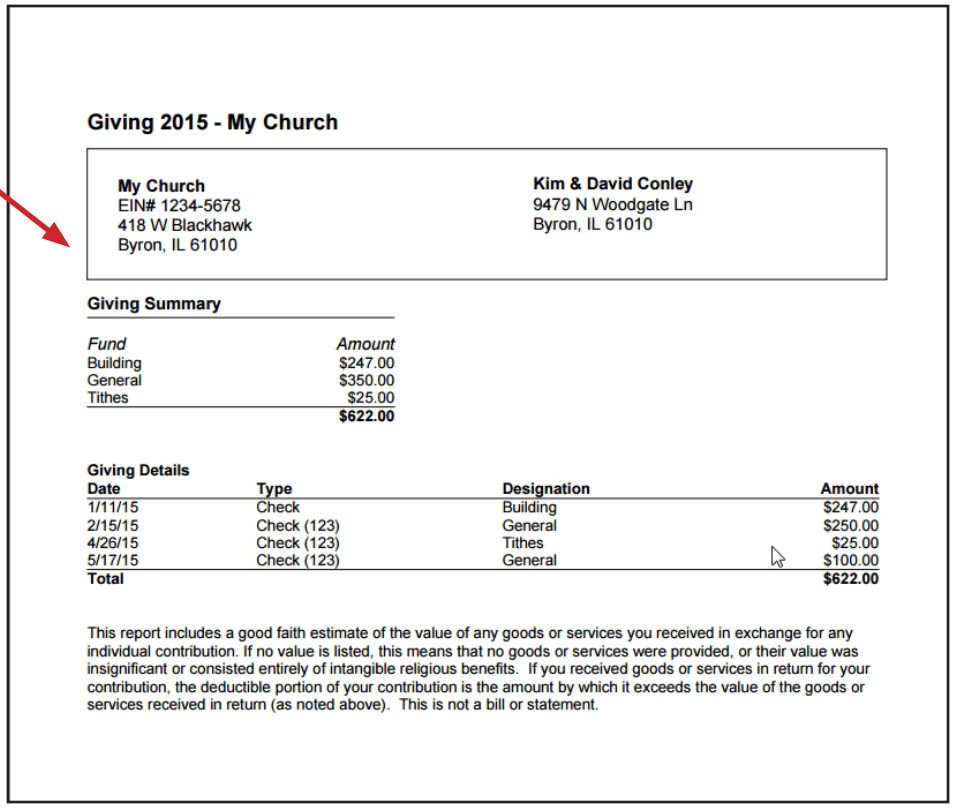
1. Click on MyGiving menu on the left sidebar.
2. Choose the applicable timeframe (this year or last year).
3. Click on the PDF STATEMENT button.
4. A pdf file will be downloaded to your computer.
5. Open that file, and print it.

Click to print giving statement.

Giving details listed below summary charts.



Sample giving statement.



Giving 2015 - My Church

My Church
EIN# 1234-5678
418 W Blackhawk
Byron, IL 61010

Kim & David Conley
9479 N Woodgate Ln
Byron, IL 61010

Giving Summary

Fund	*Amount*
Building	$247.00
General	$350.00
Tithes	$25.00
	$622.00

Giving Details

Date	Type	Designation	Amount
1/11/15	Check	Building	$247.00
2/15/15	Check (123)	General	$250.00
4/26/15	Check (123)	Tithes	$25.00
5/17/15	Check (123)	General	$100.00
Total			**$622.00**

This report includes a good faith estimate of the value of any goods or services you received in exchange for any individual contribution. If no value is listed, this means that no goods or services were provided, or their value was insignificant or consisted entirely of intangible religious benefits. If you received goods or services in return for your contribution, the deductible portion of your contribution is the amount by which it exceeds the value of the goods or services received in return (as noted above). This is not a bill or statement.

Groups

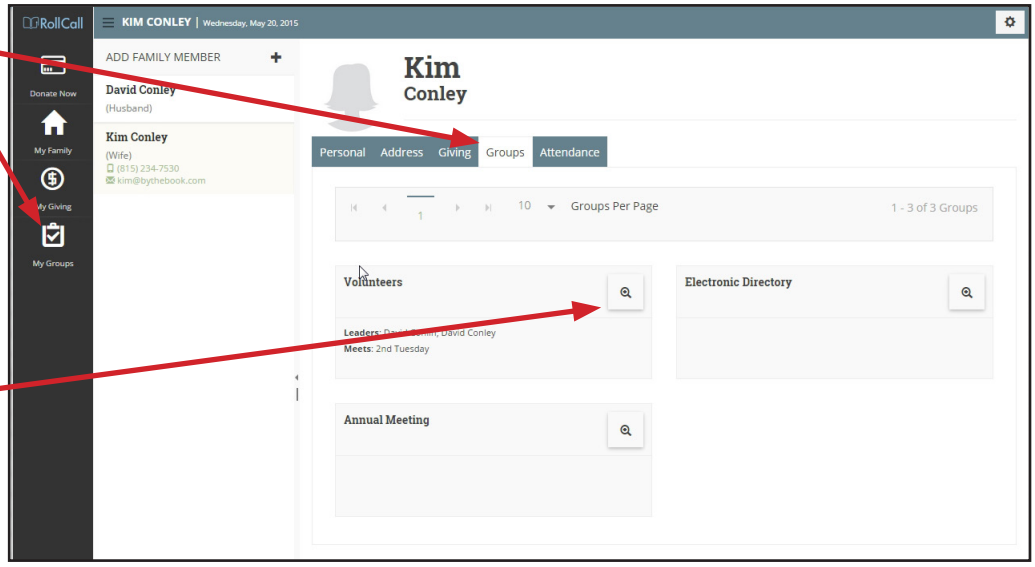
To view a list of groups that you are involved in, click on myGroups from the left side menu or from your profile page click on the groups tab. A page will be displayed that shows each group you are in, the leaders, where and when the group meets.

View Group Details

To view the details of the group, click on the magnifying glass to the right of the group name, or click on the group name. The group details will be displayed. The information displayed for each group is determined by the Connect settings in Roll Call.

Click on groups tab or My Groups menu to view details.

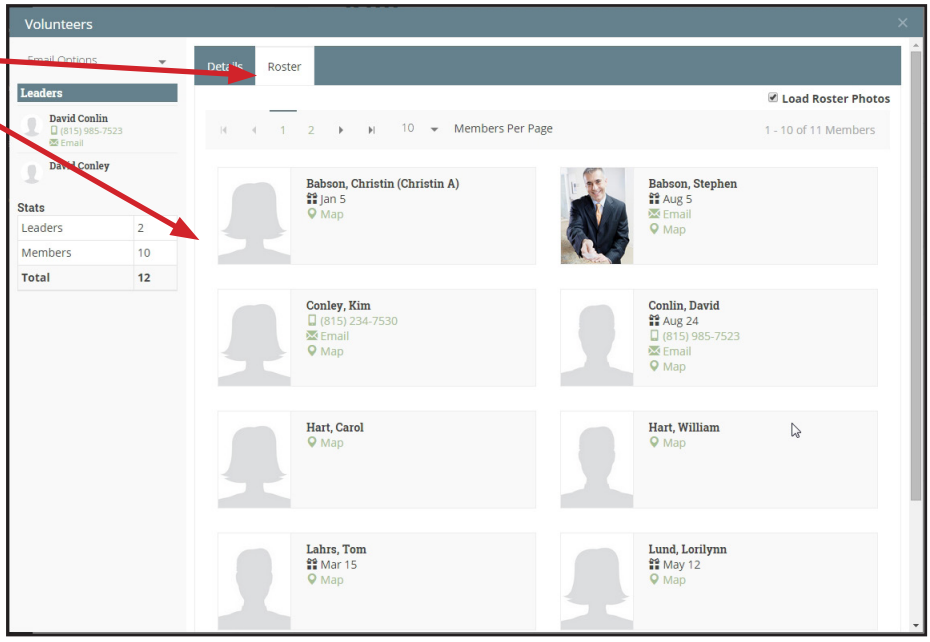
Click on magnifying glass to view group details.



Look up Group Roster

To view a list of people that are involved in the group, click on My Groups from the menu on the left. Click on the magnifying glass to the right of the group you'd like to view a roster for. Click on the Roster tab. This will display all the group members, their birthday, an email link, map link and cell number. The pictures of the group members may also be displayed by marking the box *Load Roster Photos*.

Click on Roster tab to view all folks enrolled in this group.



The Roll Call Connect settings will determine if the Roster is available to all group members or just the leaders and administrators of the group.

Map to Group Members Home

To get directions to a group member's home, click on My Groups from the menu on the left. Click on the magnifying glass to the right of the group you'd like to view a roster for. Click on the Roster tab. Click on the Map link for the person you'd like directions to their home.

Email Group Member(s)

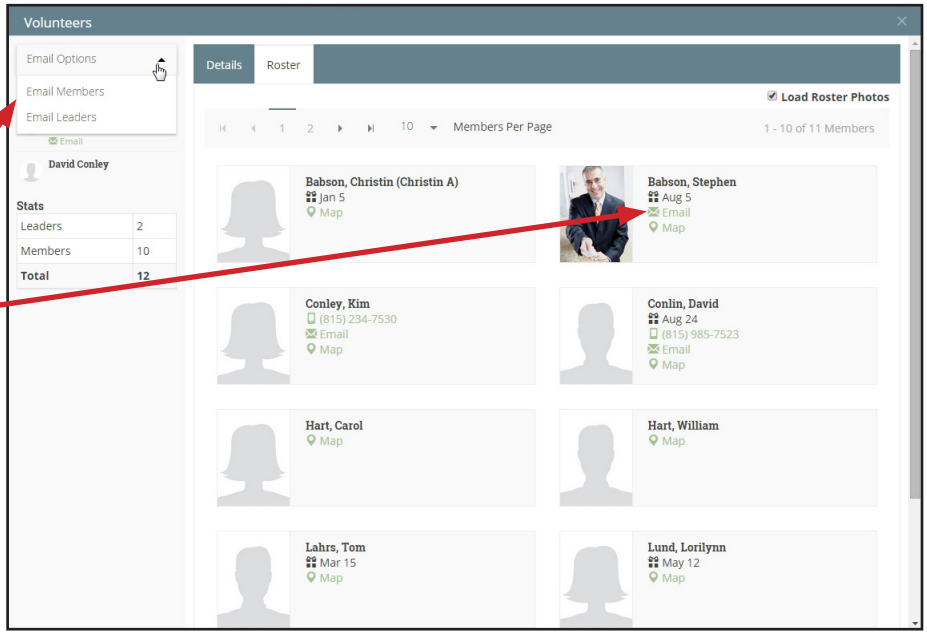
To email a specific group member, do the following:

1. Click on My Groups.
2. Click on magnifying glass to the right of the group that the person is involved in.
3. Click on the Roster tab.
4. Click on the Email link underneath the person's name that you'd like to email.
5. Your email program will be displayed with the person's email address in the To section.
6. Compose your email and click SEND.

To email all group members, leaders or administrators, do the following:

1. Click on My Groups.
2. Click on magnifying glass to the right of the group that the person is involved in.
3. Choose your selection in the *Email Options* drop down box.
4. Your email program will be displayed with the member's email addresses in the To section.
5. Compose your email and click SEND.

Click on Email under a person's name to send individual email. Or choose option to email all members or leaders.



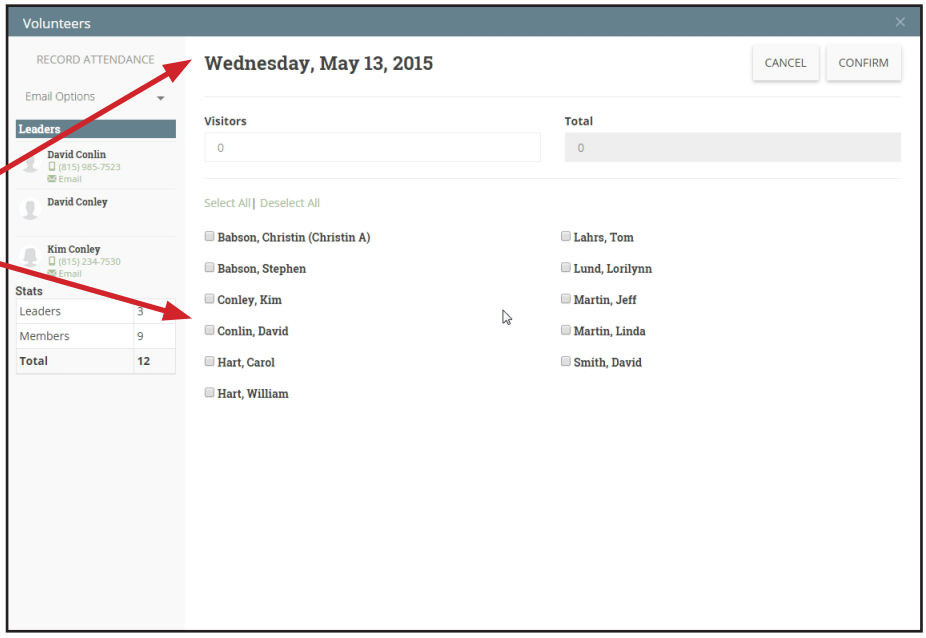
Record Attendance

If you are the leader or administrator of a group, you will be able to record attendance for the group. To record attendance for the group, do the following:

1. Click on My Groups.
2. Click on the magnifying glass for the specific group.
3. Click on the RECORD ATTENDANCE button.
4. Choose the date you are recording attendance for.

5. Mark the box for each person that was present.
6. If you had visitors attend the meeting that are not listed in your group, enter that number in the *Visitors* box.
7. Click CONFIRM to record this information.

Select date, then mark folks who were present.



USING CONNECT TABLET/DESKTOP

STAFF MEMBERS

In addition to the functionality available to your congregation, staff members will have access to additional information and functionality:

1. View various attendance and contribution summary reports.
2. Look up contact information for families in your congregation.
3. Add additional families to Roll Call.
4. Update profile information for your congregation.
5. Email folks in your congregation.
6. Enter and view visitation notes.
7. Enter and view confidential comments.

Based on your church's Roll Call settings some of these functions may not be available.

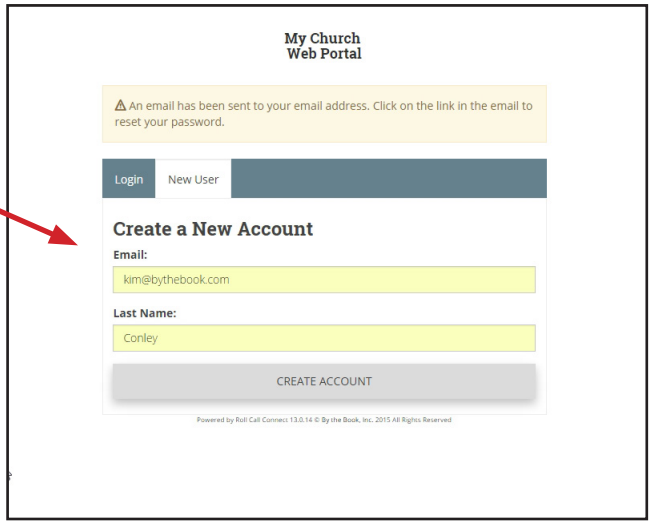
Logging into Roll Call Connect

To access Roll Call Connect, the user must login from a web browser. The URL for the login page will be the ip-address of the Roll Call Server machine followed by "/co", for example http://your-ip-address/co . Ideally that ip address will be fixed and you'll have a "Login" link on your website pointing to that page.

If you have not created a Connect account yet, you'll need to do that:

1. Click on the NEW USER tab.
2. Enter your *Personal Email* address.
3. Enter your *Last Name*.
4. Click SUBMIT.

From the New User tab, enter your email and last name.



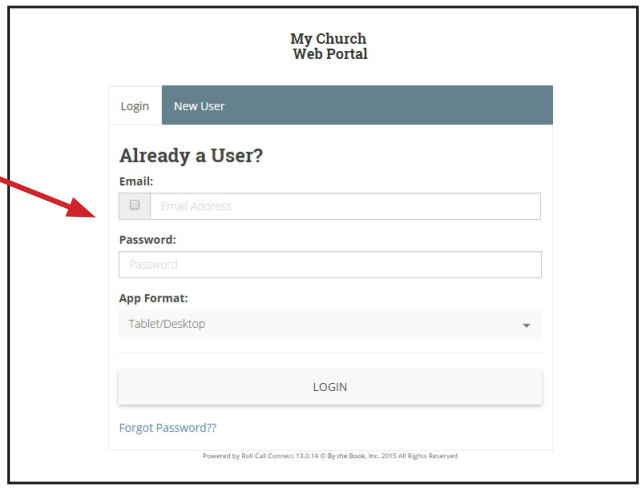
5. If the system finds a match between that email address and last name, you will receive an email with a link to set your password. This person must be marked as a staff member in Roll Call for this functionality to be available to them.
6. From your email program, click on the link in the email. It will take you to a page to set your password.

You are now ready to log in and start using Connect.

To log into Connect, do the following:

1. Make sure you are anchored on the Login tab.
2. Enter your *User Name* (email address).
3. Enter your *Password.*
4. Choose the *App Format* (Desktop/Tablet).
5. Click LOGIN.

From the Login tab, enter your email address and password.



Forgot Password

If you have created a Connect username, but have forgotten you password, simply click on the *Forgot Password* link from the login screen. You'll be prompted to enter your email address and last name. Enter that information and click SEND LINK. An email will be sent with a link to update your password.

Change Password

If you would like to change your password:

1. Log into Connect.
2. From the Gear button in the upper right of the page, click on the *Change Password* link.
3. Enter a new password.
4. Enter the new password again in the *Confirm* box.
5. Click CONFIRM.

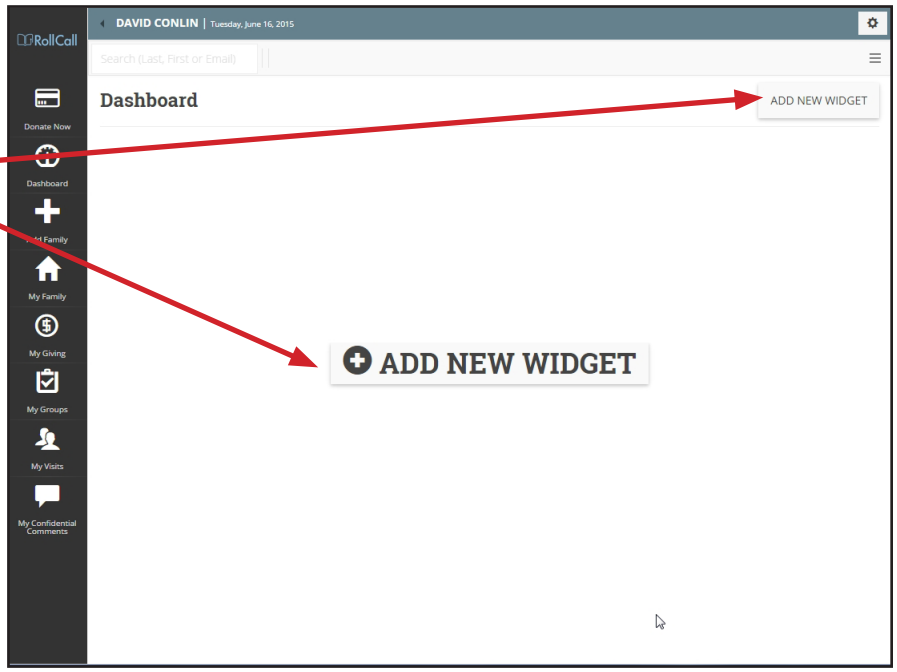
Setting Your Dashboard Widgets (reports)

There are a variety of reports or "widgets" that can be displayed on your home page once you log into Roll Call Connect. Each staff member will have the opportunity to customize their dashboard to display the widgets they are interested in. The permissions set for each staff user will dictate which widgets will be available for them to choose.

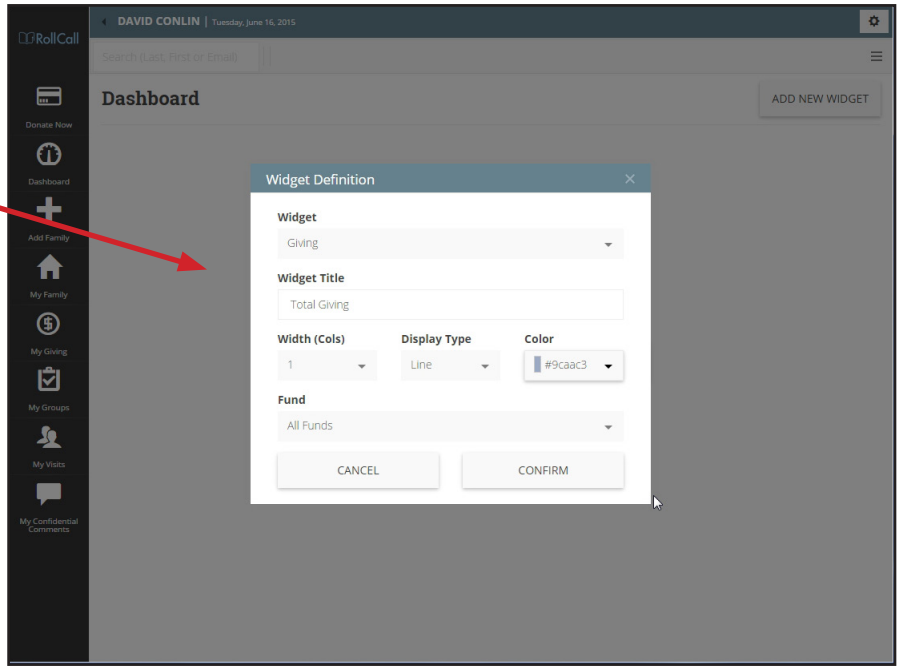
To add widgets to your dashboard, do the following:

1. Click/tap on the ADD WIDGET button.
2. Choose the type of *Widget* from the drop down list.
3. Give the widget a *Title*.
4. Choose the *Width* for the report. The dashboard is divided into 3 columns. If you choose 3 as your width, the report will extend the length of the window. If you choose 1, it will only cover 1/3 of the window.
5. Choose the *Display Type* and *Color*.
6. Enter any specific criteria based on the type of widget. For example on the Giving Widget, you can specify certain funds.
7. Click CONFIRM to add the widget to your dashboard.

Tap or click on ADD WIDGET button.



Choose the type of widget, name it, and choose criteria.



The following are the different types of widgets/reports that are available:

Giving

The Giving widget will display weekly giving totals for all funds, or giving for one specific fund.

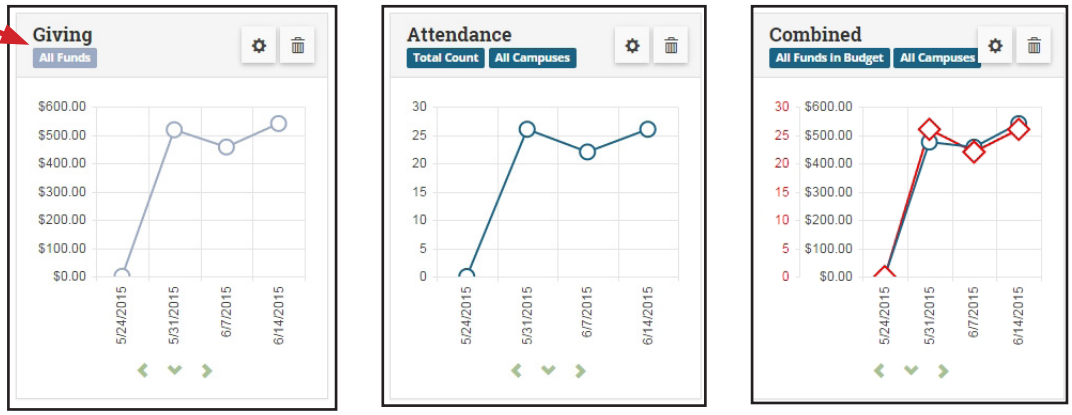
Attendance

The Attendance widget will display weekly head count or people count totals for the week. You can further define it for a specific campus, attendance type (service or group) and department.

Combined

The Combined widget graphs both attendance and giving data. You can further define it for a specific campus and fund.

Examples of the Giving, Attendance and Combined widgets.



Birthdays

The Birthday widget will display how many people have a birthday today, this week and next. When you click on that number, you will get a list of the people and their birthday.

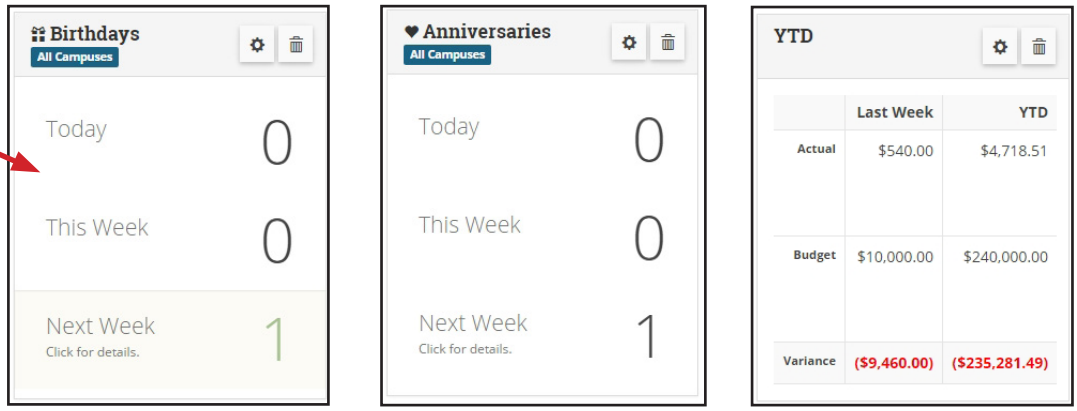
Anniversaries

The Anniversary widget will display the number of families that have an anniversary today, this week and next week. When you click on the number, you will get a list of the couples and their anniversary.

YTD

The YTD widget will compare actual giving to budgeted giving. The first column will display last weeks giving figures. The second column contains Year to Date totals and budget amounts.

Examples of the Birthday, Anniversay and YTD widgets.



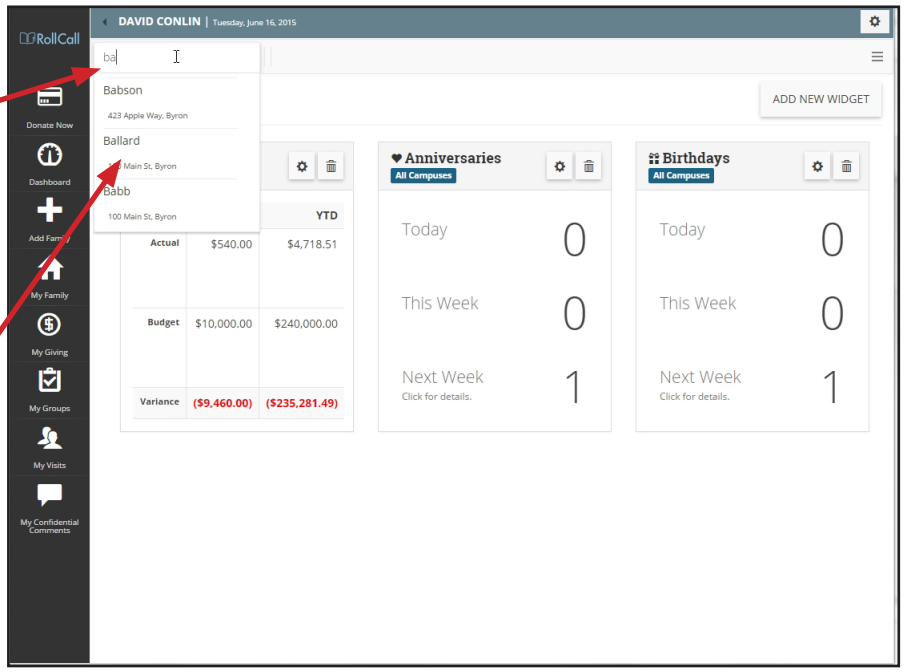
To remove a widget from your dashboard, simply click/tap on the trash can icon to the on the right side of the widget. To modify your widget, click or tap on the gear icon. Enter the new preferences then press CONFIRM.

Looking up a Family

To look up a specific family, start typing their last name in the search box, found underneath your user name in the upper left portion of the window. As you start typing several letters, the system will display a list of families whose last name starts with those characters. Click on the specific family in the list to view their detailed information.

Enter the first few characters of the last name to get search results.

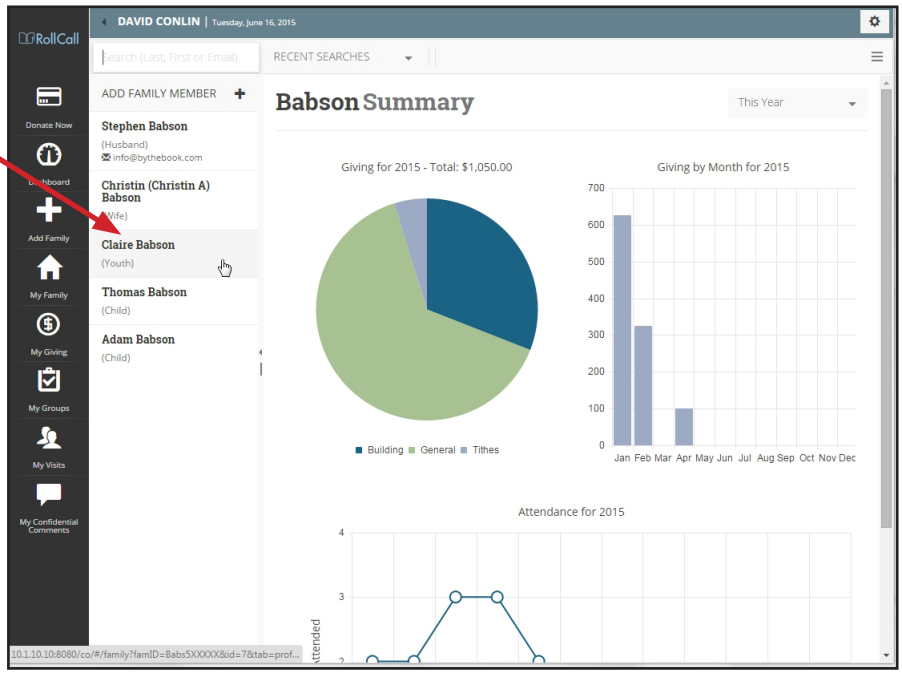
Tap on the name in the results list to view their information.



Contact information

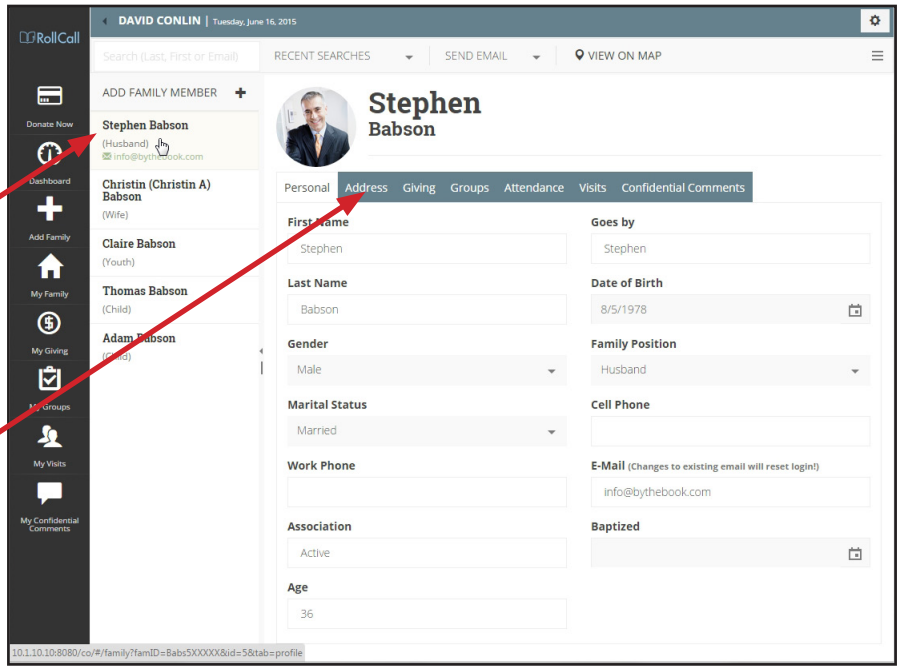
Once you've selected a family from the search results, you will see a list of family members on the left side of the window. Click or tap on one of the family members to view their profile information. The first page will have personal profile information on it, for example, birthday, personal email and cell phone number. To view the address information or home phone number, tap or click on the Address tab.

Families home page with list of family members.



Tap on family members name to get to their profile page.

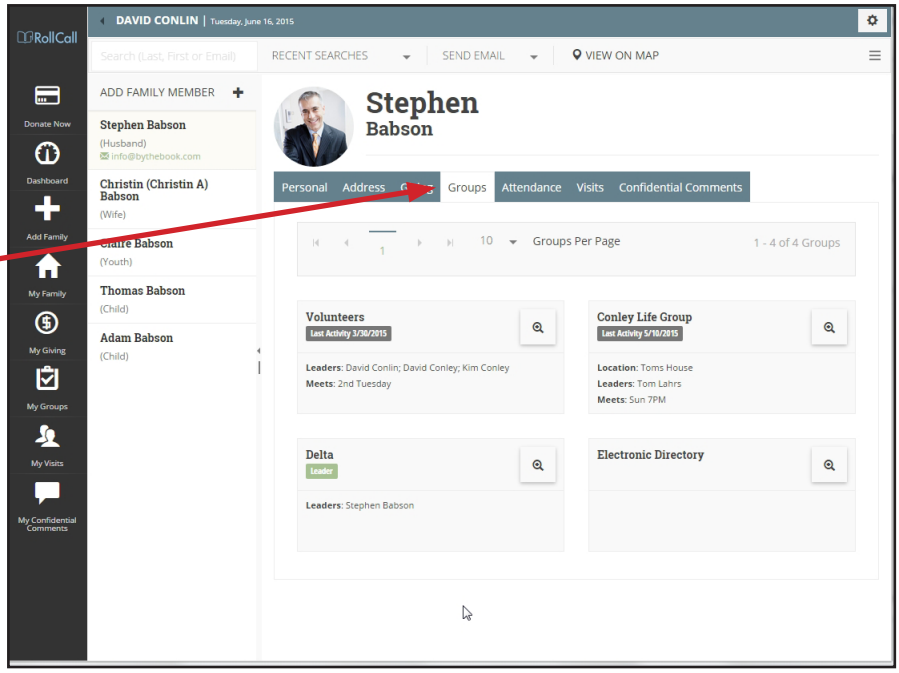
Tap on address tab to view address/ family information.



Group Involvements

Once you've selected a family from the search results, you will see a list of family members on the left side of the window. Click or tap on one of the family members to view their details. To view the groups they are involved in, click or tap the Groups tab. To view the details of that group, tap the magnifying glass to the right of the group name.

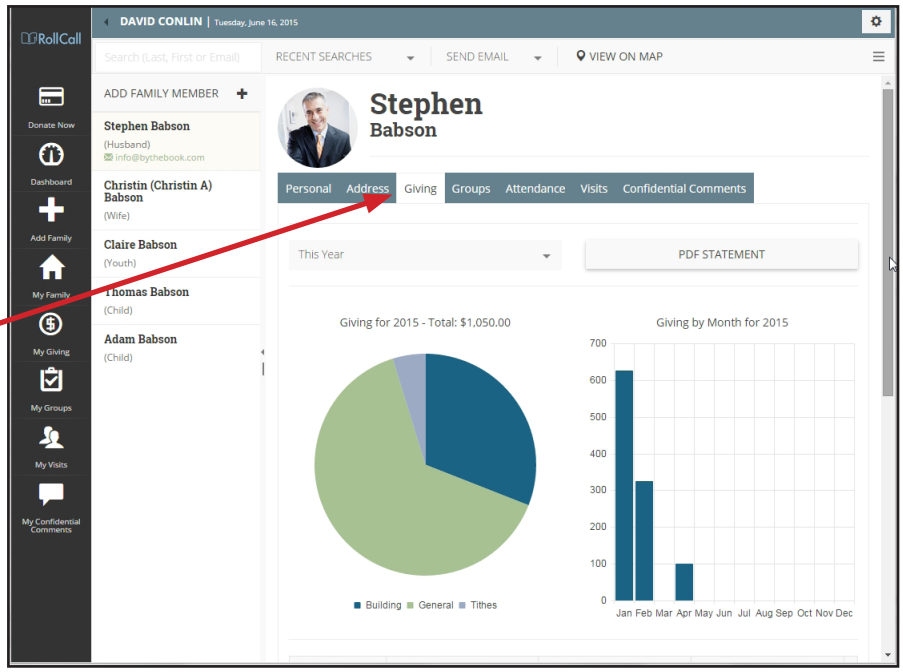
Click on groups tab to view this person's group involvements.



Giving History

Once you've selected a family from the search results, you will see a list of family members on the left side of the window. Click or tap on one of the family members to view their details. To view their giving history, click or tap on the Giving tab. Depending on your user permissions, this tab may or may not be available.

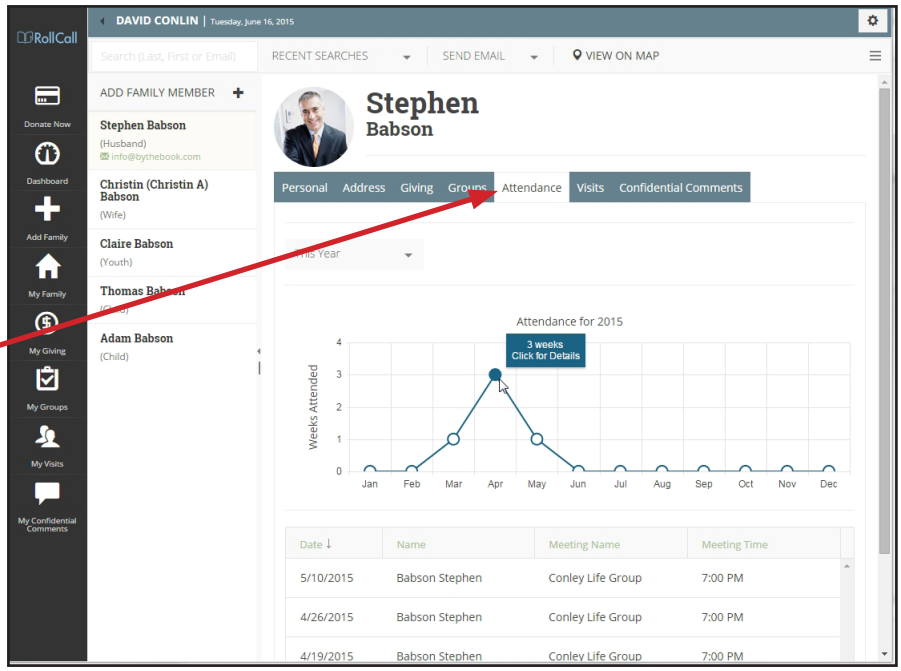
From the giving tab, you can view summary graphs or scroll down to view details.



Attendance History

Once you've selected a family from the search results, you will see a list of family members on the left side of the window. Click or tap on one of the family members to view their details. To view their attendance history, click or tap the Attendance tab.

From the attendance tab, you can view attendance history.



Updating Family Information

To update contact information, add a new family member or upload a picture, you'll first need to pull up the person's record. To do that, type in the first few characters of their last name in the search box. Click or tap on their name from the search results list. A list of family members will be displayed. Click or tap the specific family members name from the list.

Update Profile/ General Information

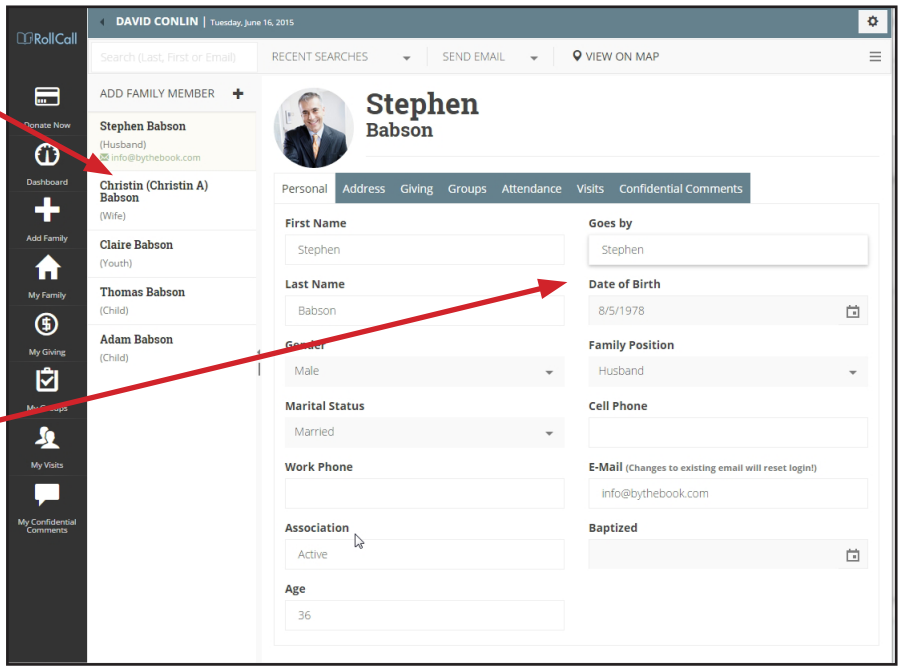
To update the personal profile information:

1. Click on family members name.
2. Make sure you are anchored on the Personal tab.

3. Update the necessary information such as name, birthday, cell phone etc.
4. Click on the SAVE PROFILE button in the upper right.

Click on family members name.

Place cursor in appropriate field and make necessary changes.

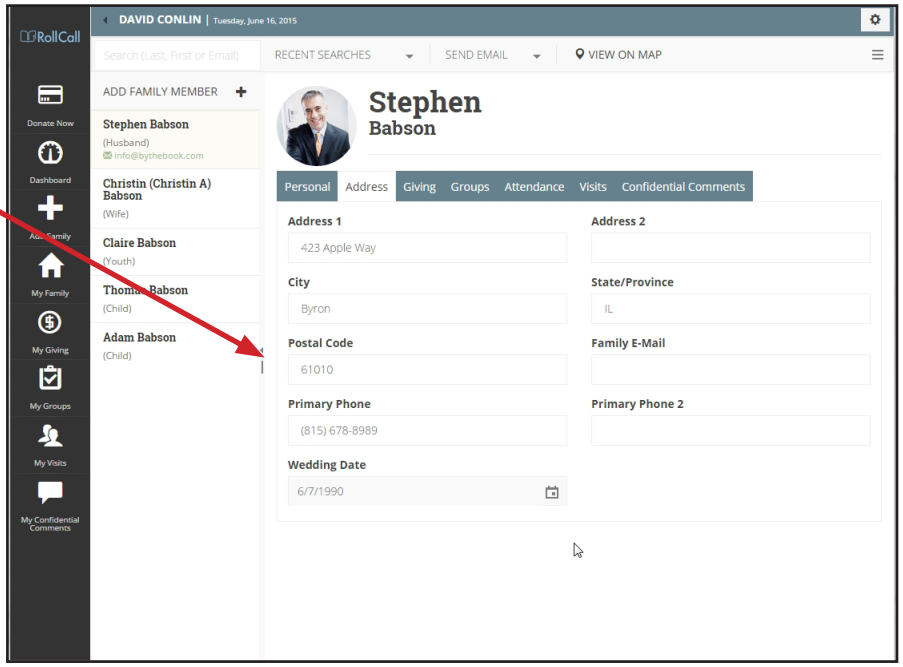


Update Address Information

To update the address or family type information:

1. Click on any family members name.
2. Click on the Address tab.
3. Update the necessary information such as address, home phone or family email address.
4. Click on the SAVE PROFILE button in the upper right.

Click on Address tab to make changes to any address information.



Add New Family Member

To add a new person to the family, do the following:

1. Click on the ADD FAMILY MEMBER button.
2. Enter the information about this person, name, gender, birthdate, etc.
3. Click SAVE PROFILE button in the upper right.

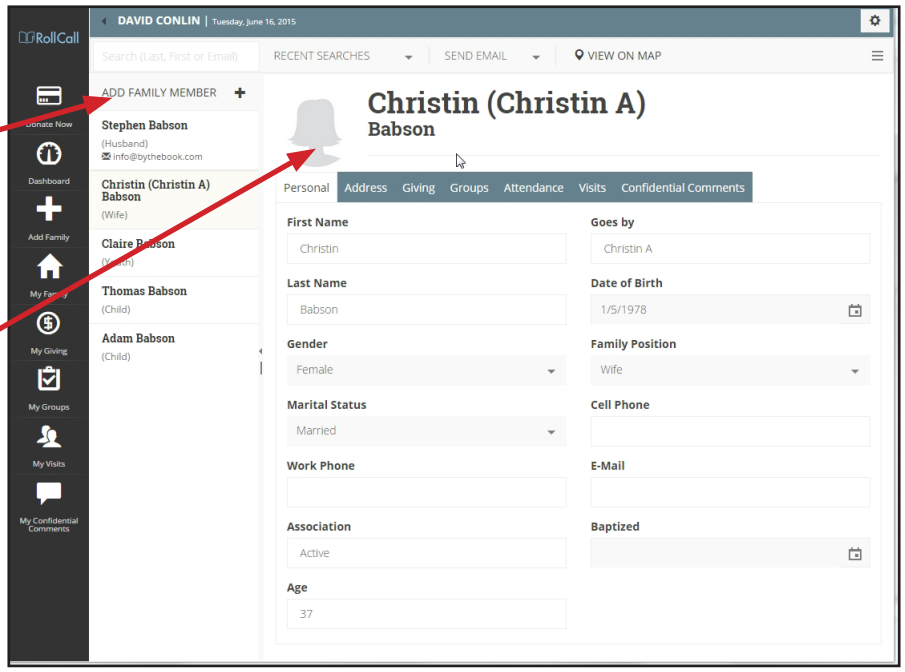
Upload Picture

To upload a profile picture for a person in the family, do the following:

1. Click on the name of the family member for which you'd like to upload a picture.
2. Click on the head image to the left of the person's name.
3. Navigate to the image file you'd like to upload.
4. Click SAVE PROFILE button.

Click on ADD FAMILY MEMBER to add additional family members.

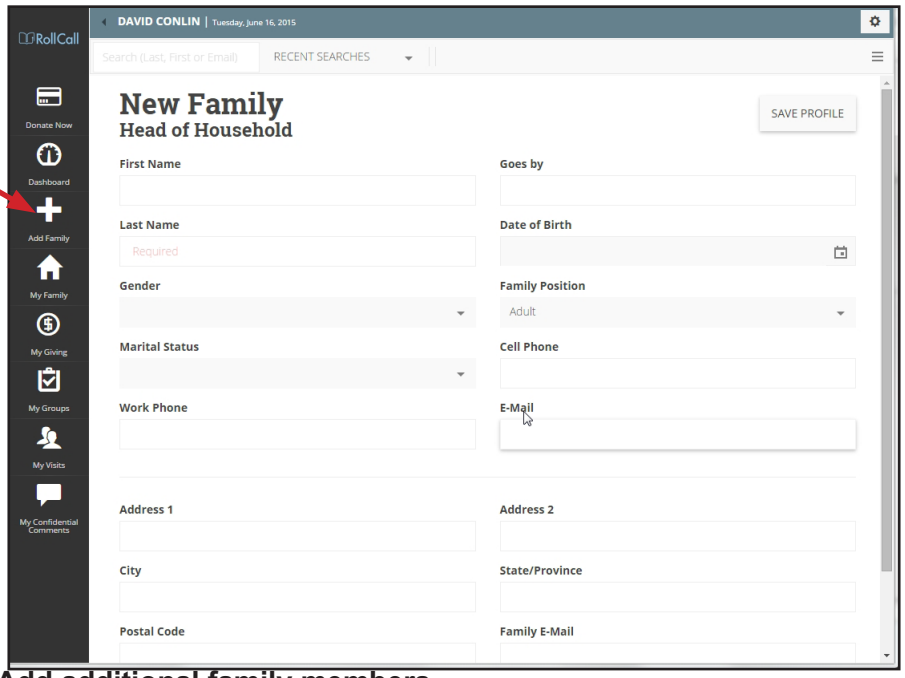
Tap on image to upload a picture.



Add a New Family to Database

To add a new family into Roll Call, click or tap on the Add Family menu icon on the left side. This will bring up a form for you to enter the basic contact information for the head of the family. Once you've entered that information, make sure to click or tap SAVE PROFILE.

Tap on the Add Family menu to begin adding a new family into the database.



Add additional family members

If there are additional family members to be added to the family, click or tap the ADD FAMILY MEMBER button in the upper left portion of the window. This will open up a form for you to enter the personal profile information for the additional family member.

Sending Email

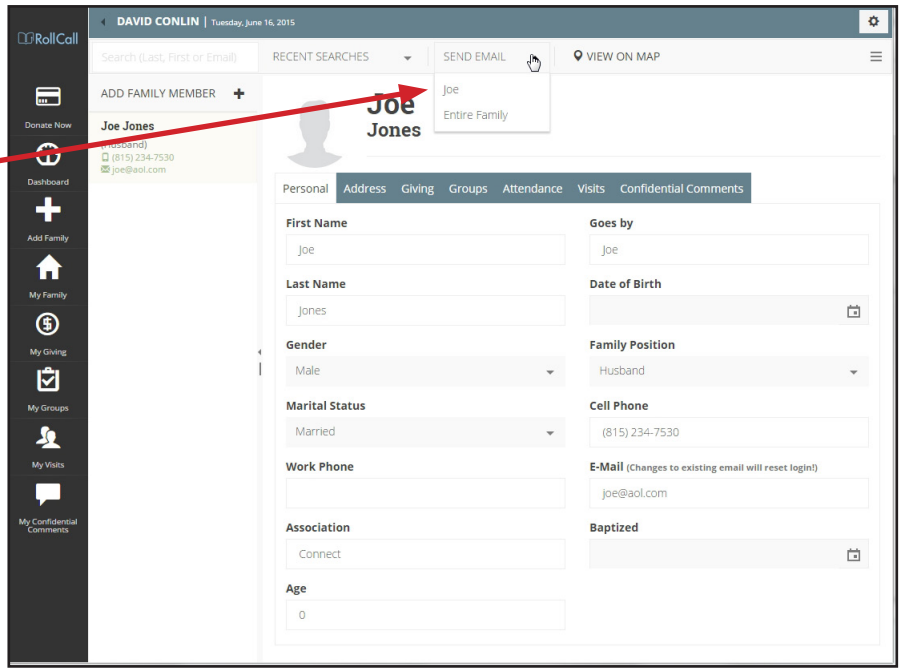
Within Roll Call Connect, you'll be able to send email to an individual, family or group. Your device's default mail program will be returned with the To addresses filled in.

An individual

To send an email to a specific person, do the following:

1. Type in the last name of the individual in the search box.
2. Select the appropriate family from the results box.
3. Tap or click on the individuals name from the family members list.
4. From the *Email* drop box at the top, choose individual.
5. From your email program, compose and send your email.

Use the drop down to choose to email individual or entire family.



A family

To send an email to an entire family, do the following:

1. Type in the last name of the family in the search box.
2. Select the appropriate family from the results box.
3. From the *Email* drop box at the top, choose entire family.
4. From your email program, compose and send your email.

A group of people

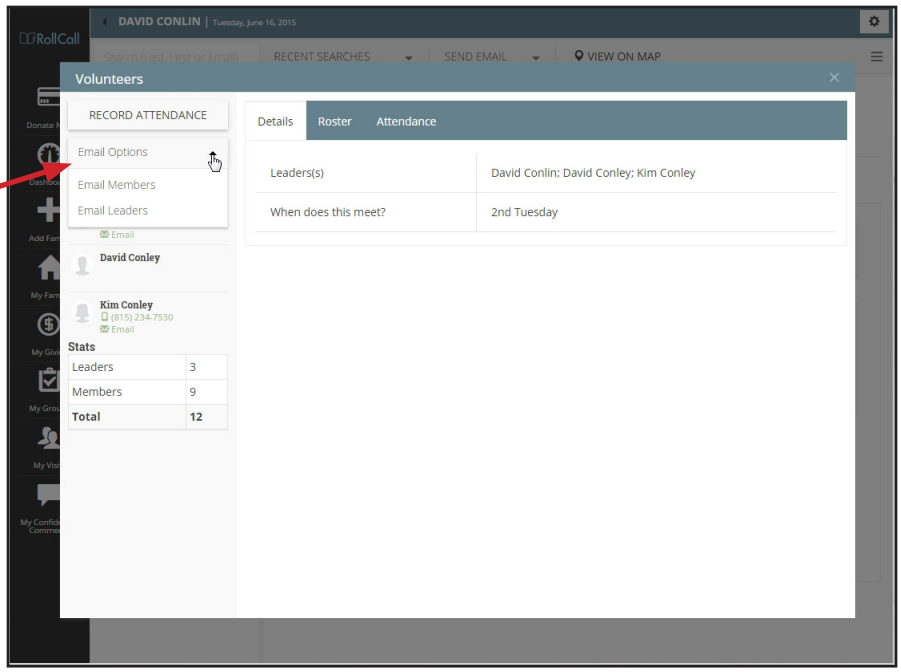
To email a specific group member, do the following:

1. Click on My Groups.
2. Click on magnifying glass to the right of the group that the person is involved in.
3. Click on the Roster tab.
4. Click on the Email link underneath the person's name that you'd like to email.
5. Your email program will be displayed with the person's email address in the To section.
6. Compose your email and click SEND.

To email all group members, leaders or administrators, do the following:

1. Click on My Groups.
2. Click on magnifying glass to the right of the group that the person is involved in.
3. Choose your selection in the *Email Options* drop down box.
4. Your email program will be displayed with the member's email addresses in the To section.
5. Compose your email and click SEND.

From within a group, choose who you'd like to email.

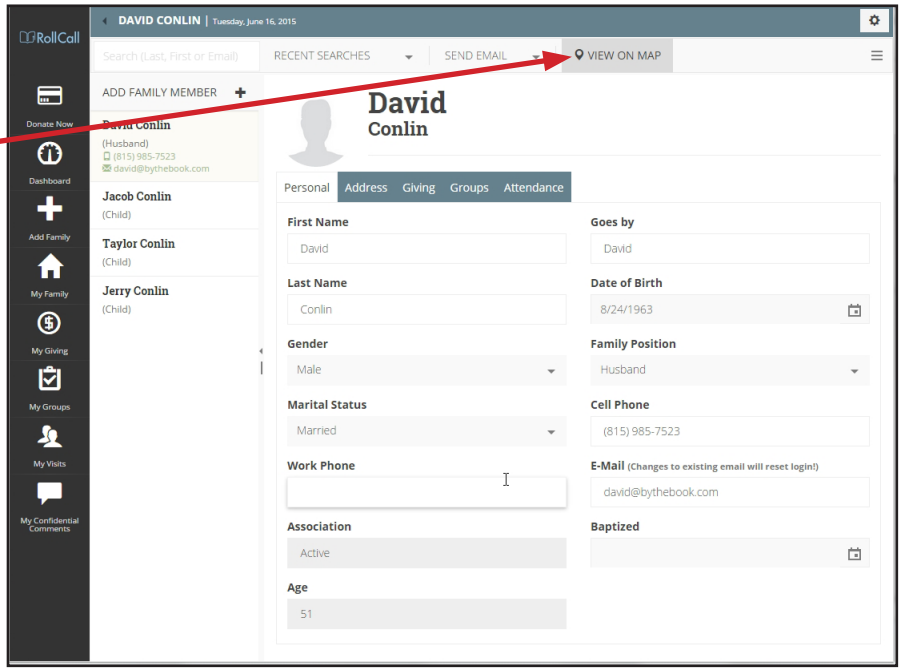


Getting Directions (map)

To view a map of families address, you'll first need to pull up that families profile information. Do the following:

1. Type in the last name of the family in the search box.
2. Select the appropriate family from the results box.
3. Click or tap on VIEW ON MAP.
4. This will bring up your default maps program with the address highlighted.

Tap view on map to see this family's address in your map program.



Visitation Notes

Visitation notes may be added or viewed in several different ways:

1. From within a person's profile information.
2. From the My Visits menu.

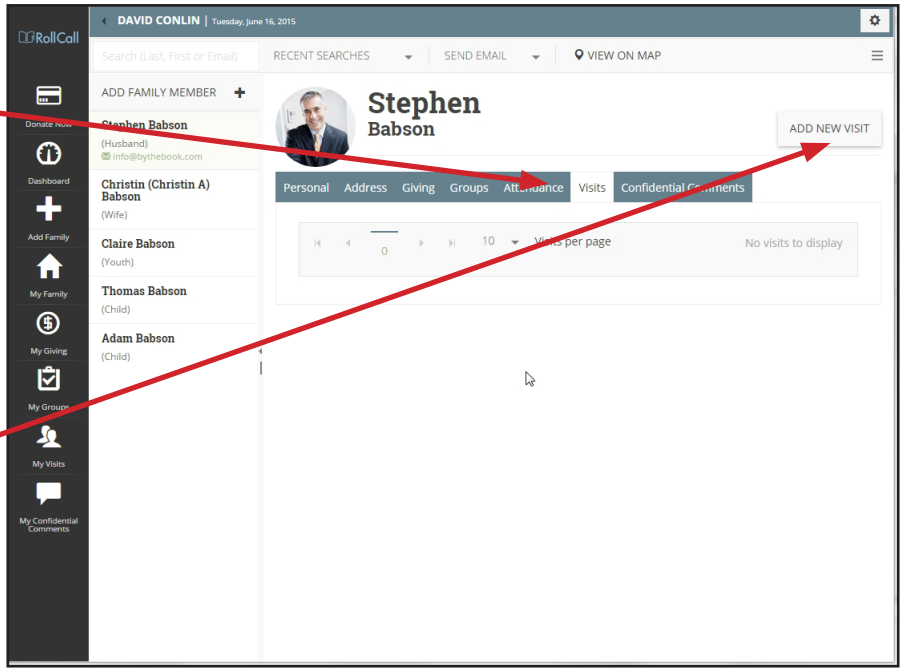
Enter visitation notes

To enter visitation notes, from an individual's record do the following:

1. Type in the last name of the individual in the search box.
2. Select the appropriate family from the results box.
3. Tap or click on the individuals name from the family members list.
4. Tap or click on the Visits tab.
5. Tap or click on the ADD VISIT button.
6. Enter the *Date* of the visit.
7. Enter the *Type* of visit (phone, in person, etc)
8. Enter the *Notes* for the visit.
9. Tap or click on the check mark to save this information.

From within the person's record, tap on the visit tab.

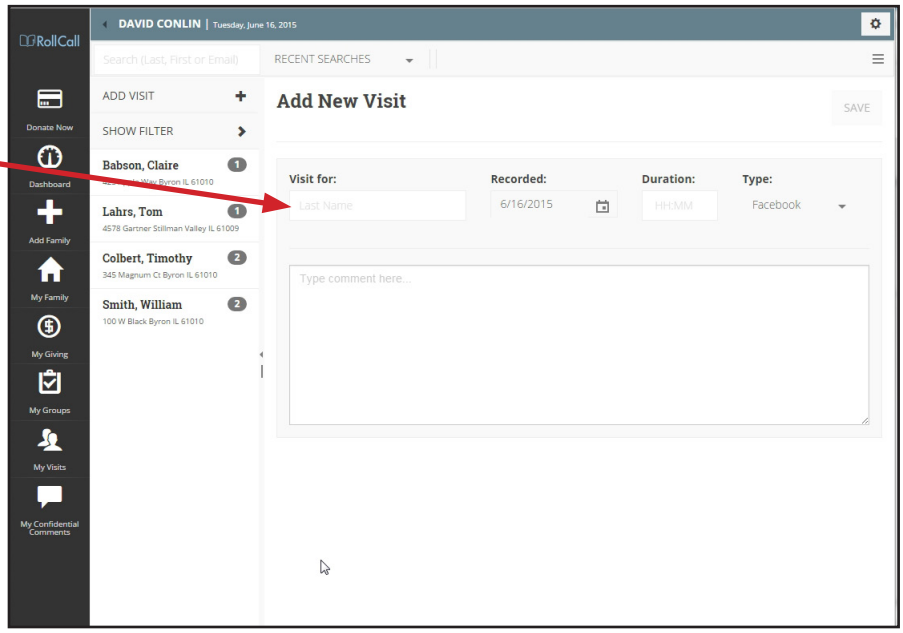
Tap or click on ADD VISIT to enter the new visitation information.



To enter visitation notes from My Visits, do the following:

1. Click or tap on the My Visits menu on the left.
2. You are now on the Add Visit window.
3. Enter the last name of the person you have visited. Choose the appropriate person from the list.

Enter the Last Name of the person you visited.



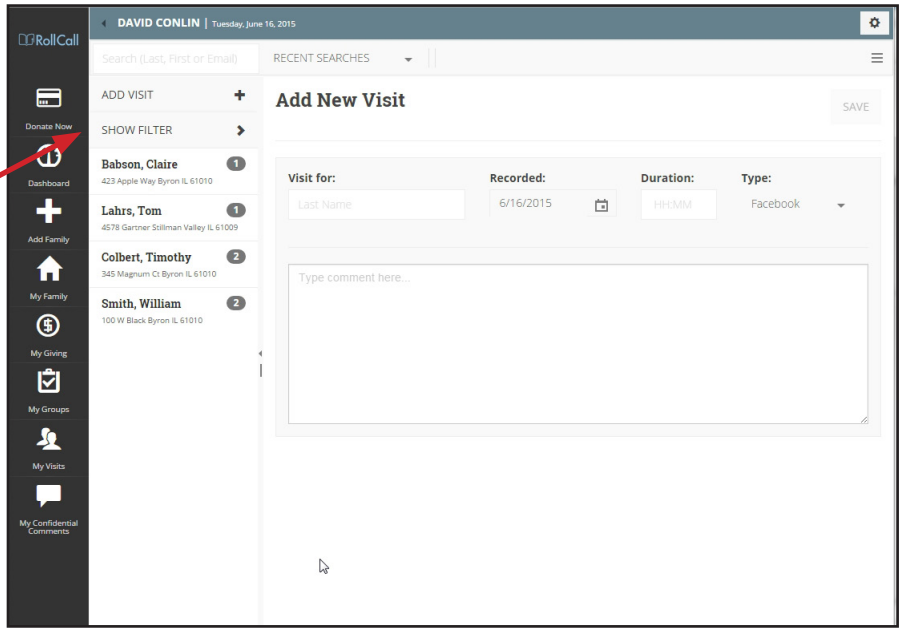
4. Enter the *Date* of the visit.
5. Enter the *Duration* of the visit.
6. Enter the *Type* of visit.
7. Enter the visitation *Comment*s.
8. Click or tap the SAVE button to save this information.

Look up visitation notes I entered

To view the notes that I have entered, do the following:

1. Click or tap on the My Visits menu on the left.
2. A list of the people who have visitation notes that you've entered are listed on the left side.
3. If you need to filter that list of people, tap or click on the SHOW FILTER button. Enter the first few characters of the name to reduce the list.
4. Tap on the specific person's name.
5. Their visitation notes will be displayed.

List of all the visitations you entered. Click SHOW FILTER to open up search box to search by name.



View visitation notes for a specific person

To view visitation notes, from an individual's record do the following:

1. Type in the last name of the individual in the search box.
2. Select the appropriate family from the results box.
3. Tap or click on the individuals name from the family members list.
4. Tap or click on the Visits tab.
5. Their visitation notes will be displayed.

Confidential Comments

Confidential comments may be added or viewed in several different ways:

1. From within a person's profile information.
2. From the My Comments menu.

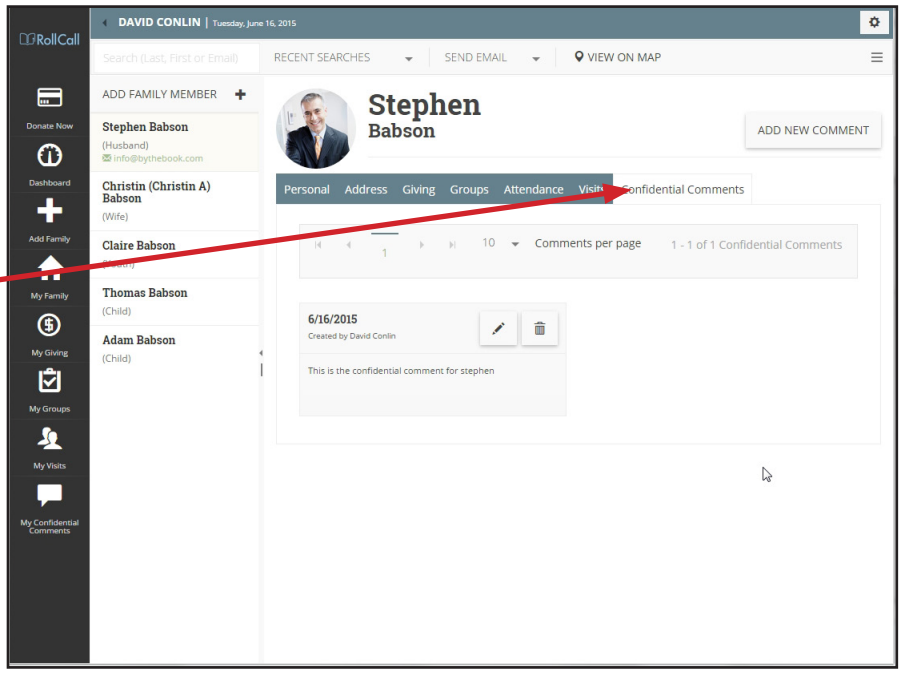
Enter confidential comments

To enter confidential comments, from an individual's record do the following:

1. Type in the last name of the individual in the search box.
2. Select the appropriate family from the results box.
3. Tap or click on the individuals name from the family members list.

4. Tap or click on the Comments tab.
5. Tap or click on the ADD COMMENT button.
6. Enter the *Date* of the comment.
7. Enter the *Comments*.
8. Tap or click on the check mark to save this information.

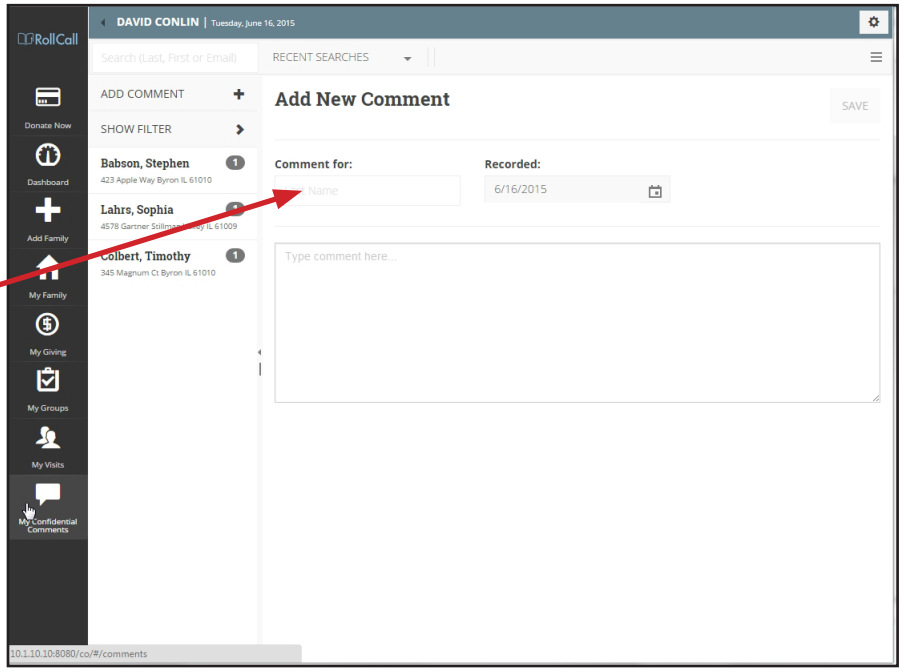
From within a person's record, tap or click the Confidential Comments tab.



To enter confidential comments from My Comments, do the following:

1. Click or tap on the My Comments menu on the left.
2. You are now on the Add Comment window.
3. Enter the last name of the person you have visited. Choose the appropriate person from the list.
4. Enter the *Date* of the comment.
5. Enter the *Comment*s.
6. Click or tap the SAVE button to save this information.

Enter the last name of the person you are entering the comment for.

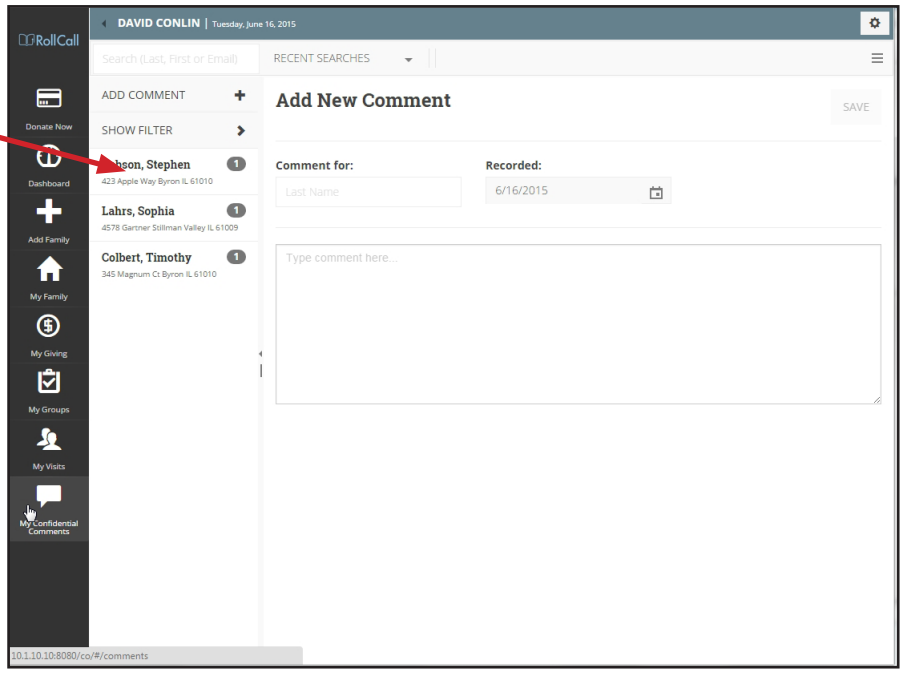


Look up confidential notes I entered

To view the comments that I have entered, do the following:

1. Click or tap on the My Comments menu on the left.
2. A list of the people who have comments that you've entered are listed on the left side.
3. If you need to filter that list of people, tap or click on the SHOW FILTER button. Enter the first few characters of the name to reduce the list.
4. Tap on the specific person's name.
5. Their confidential comments will be displayed.

List of people that have comments you entered.



View confidential comments for a specific person

To view comments from an individual's record do the following:

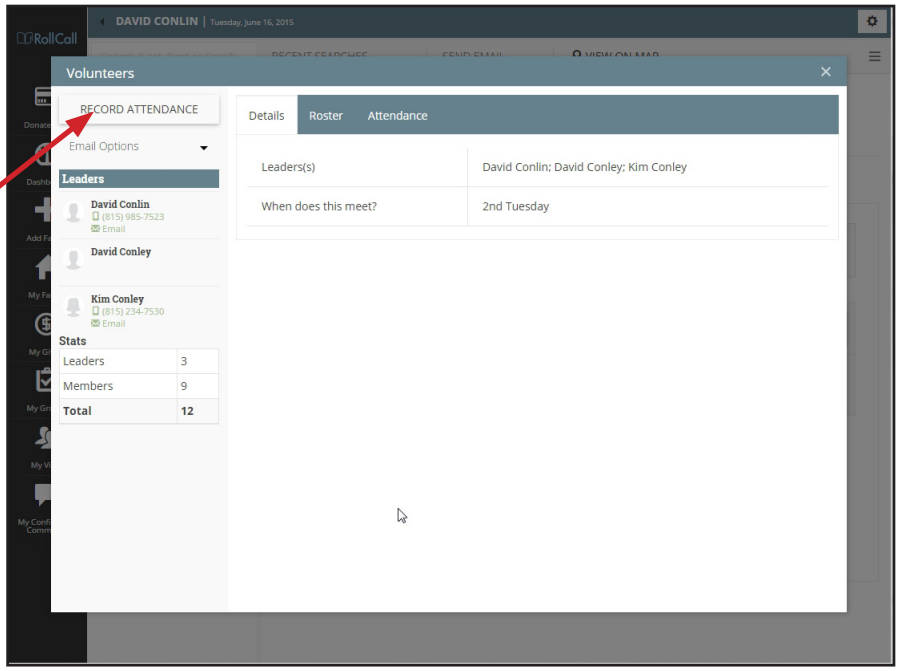
1. Type in the last name of the individual in the search box.
2. Select the appropriate family from the results box.
3. Tap or click on the individuals name from the family members list.
4. Tap or click on the Comments tab.
5. Their comments will be displayed.

Recording Attendance

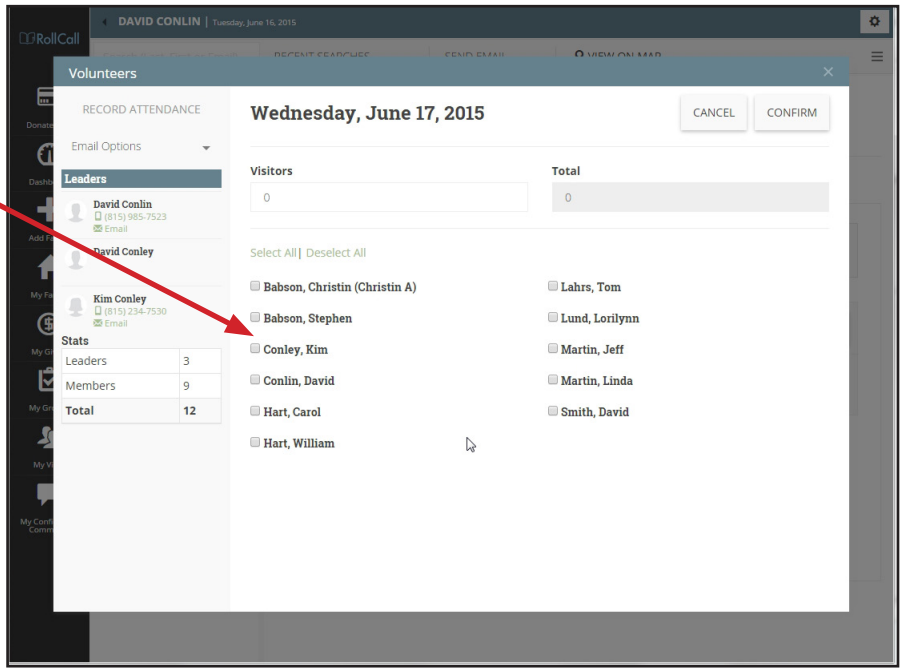
If you are the leader or administrator of a group, you will be able to record attendance for the group. To record attendance for the group, do the following:

1. Click on My Groups.
2. Click on the magnifying glass for the specific group.
3. Click on the RECORD ATTENDANCE button.
4. Choose the date you are recording attendance for.
5. Mark the box for each person that was present.
6. If you had visitors attend the meeting that are not listed in your group, enter that number in the Visitors box.
7. Click SAVE to record this information.

From within the group, click or tap the RECORD ATTENDANCE button.



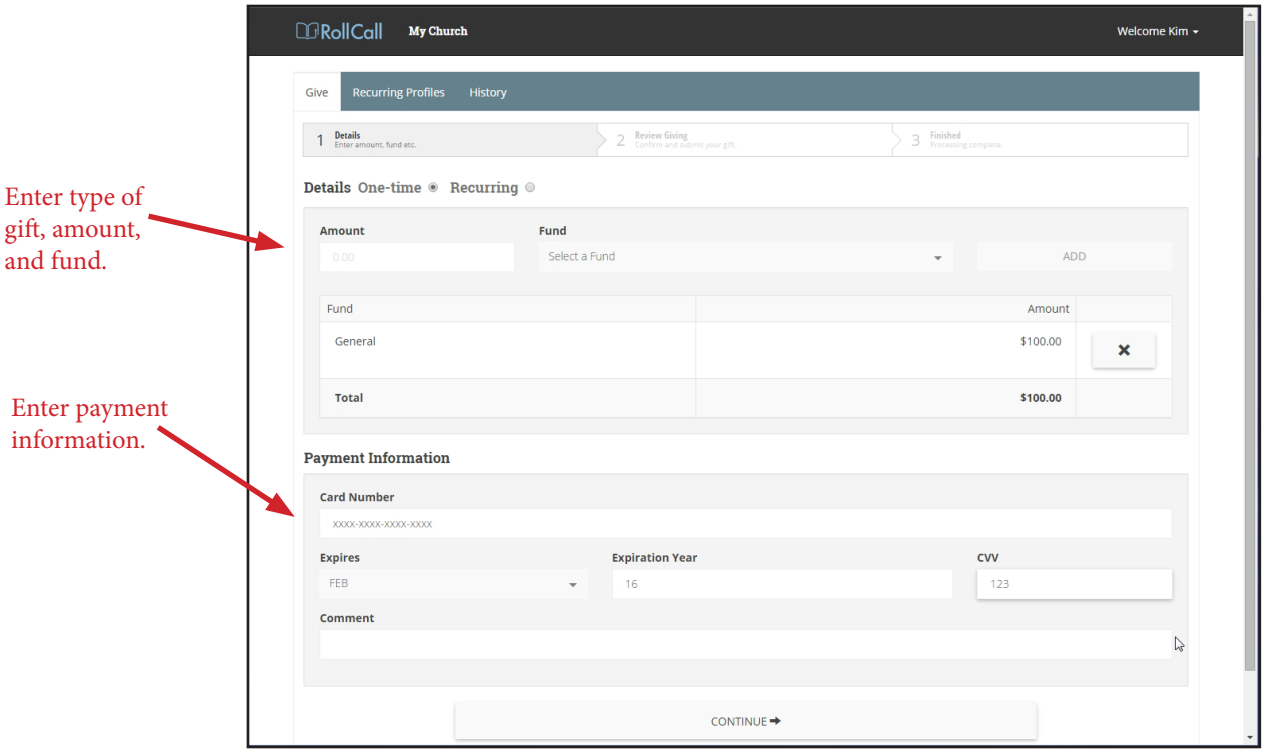
Mark the box next to the name of each person who attended.



Giving Online

To make an online donation, do the following:

1. Click on the Donate Now menu icon on the left sidebar.
2. Choose between a "one time" or "recurring" gift type
3. For "one time" gifts, enter the following information.
    a. Enter the *Amount* of the gift.
    b. Enter the *Fund* that the gift should be designated to
    c. Click the ADD button
4. For a "recurring" gift, enter the following information
    a. Select the *Schedule* type (when you want the gift to re-occur).
    b. Enter the specific date if applicable.
    c. Enter the *Start Date.*
    d. Enter the number of times you'd like this gift to occur. Leave this field blank if there is no end date.
    e. Enter the Amount of the gift.



f. Enter the Fund that the gift should be designated to.
g. Click the ADD button.

5. Once you've added all the gifts you'd like to, move on to the payment section.
6. Enter the *Card Number*.
7. Enter the *Expiration Month*.
8. Enter the *Expiration Year*.
9. Enter the *CSV Code*.
10. Click CONTINUE.
11. At this point, you may review your online gift. If everything looks correct, click SUBMIT. If you need to make changes, click EDIT GIFT.

USING CONNECT ON A SMART PHONE
CONGREGATION

Members of your staff and congregation will be able to do the following in Roll Call Connect

1. View and update their contact information.
2. View their giving history.
3. Make online contributions.
4. View groups they are involved in.
5. View a roster of group members.
6. Record attendance for a group if they are the leader or administrator for that group.

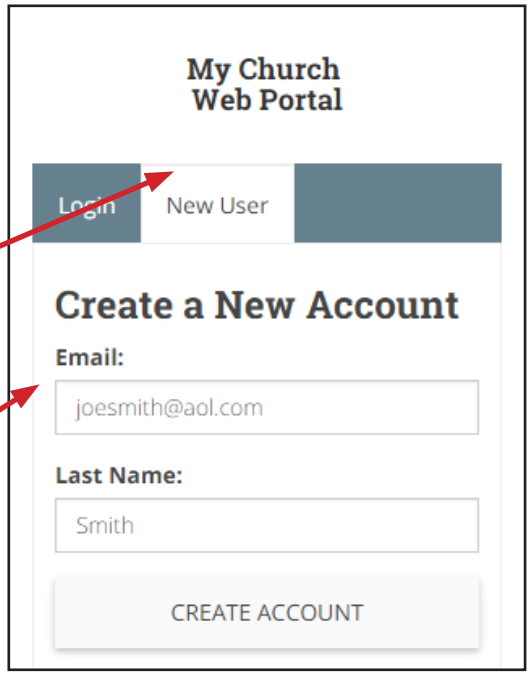
Based on your church's Roll Call settings some of these functions may not be available.

Logging into Roll Call Connect

To access Roll Call Connect, the user must login from a web browser. The URL for the login page will be the ip-address of the Roll Call Server machine followed by "/co", for example http://your-ip-address/co. Ideally you will create a domain and point it to that ip address. Please see the Connect Admin Guide for more information on this. Then set up a "Login" link on your website pointing to that page.

If you have not created a Connect account yet, you'll need to do that:

1. Tap on the NEW USER tab.
2. Enter your *Personal Email* address.
3. Enter your *Last Name*.
4. Tap SUBMIT.



5. If the system finds a match between that email address and last name, you will receive an email with a link to set your password.
6. If the system does not find a record in Roll Call with that email and last name, the user will be prompted for additional information. After this information is filled out and submitted, the user will be sent an email with a link to create a password.
7. From your email program, tap on the link in the email. It will take you to a page to set your password.

You are now ready to log in and start using Connect.

To log into Connect, do the following:
1. Make sure you are anchored on the Login tab.
2. Enter your *User Name* (email address).
3. Enter your *Password.*
4. Choose the *App Format* (Phone).
5. Tap LOGIN.

Forgot Password

If you have created a Connect username, but have forgotten you password, simply tap on the *Forgot Password* link from the login screen. You'll be prompted to enter your email address and last name. Enter that information and Tap SEND LINK. An email will be sent with a link to update your password.

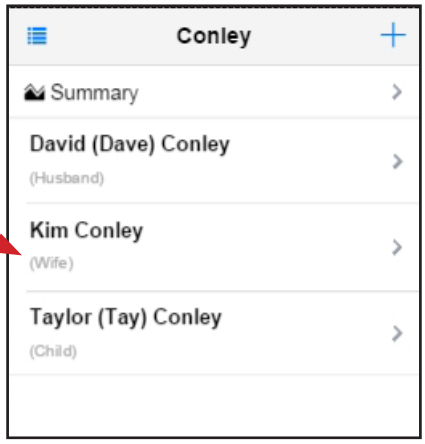
Change Password

If you would like to change your password:
1. Log into Connect.
2. From the Gear button in the upper right of the page, tap on the *Change Password* link.
3. Enter a new password.
4. Enter the new password again in the *Confirm* box.
5. Tap CONFIRM.

Profile Information

When you first log into Roll Call Connect a list of your family members will be displayed. Tap on any of the family members to view their details.

All family members are listed on the home page.

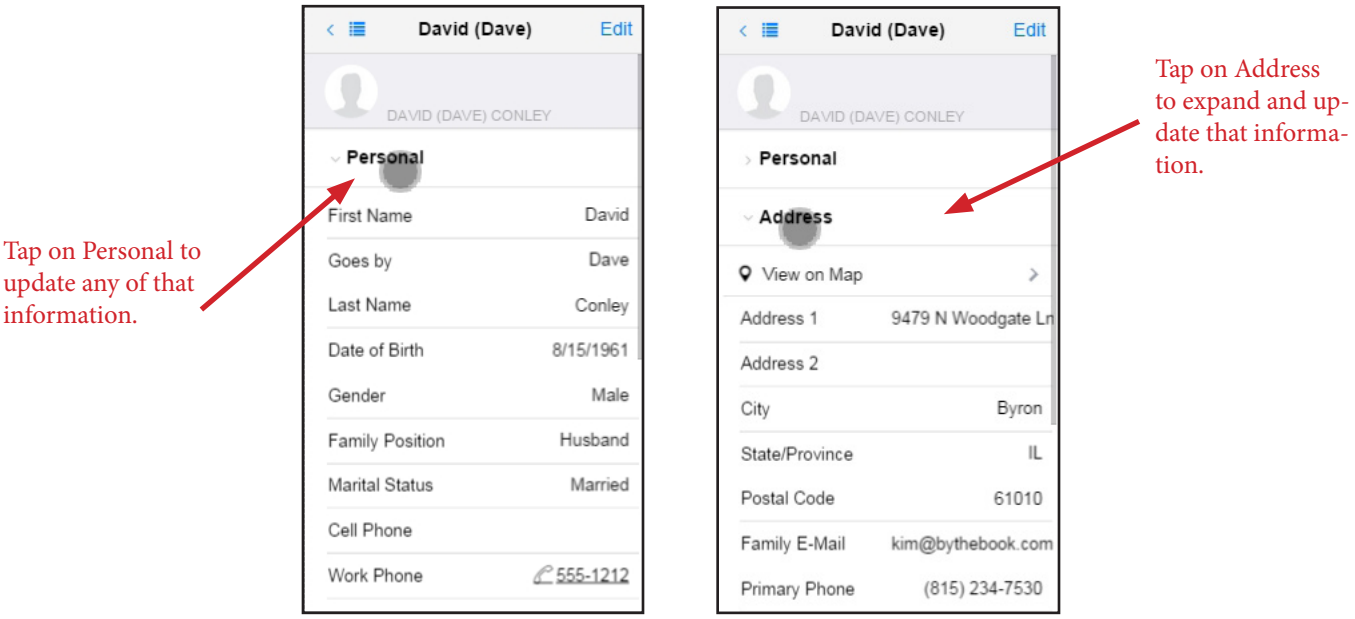


Update Profile/ General Information

To update the personal profile information:
1. Tap on family members name.
2. Tap on Personal to expand this section.
3. Tap on Edit in the upper right of the window.
4. Update the necessary information such as name, birthday, cell phone etc.
5. Tap save in the upper right to save your changes.

Update Address Information

To update the address or family type information:
1. Tap on any family members name.
2. Tap on Address to expand this section.
3. Tap on Edit in the upper right of the window.

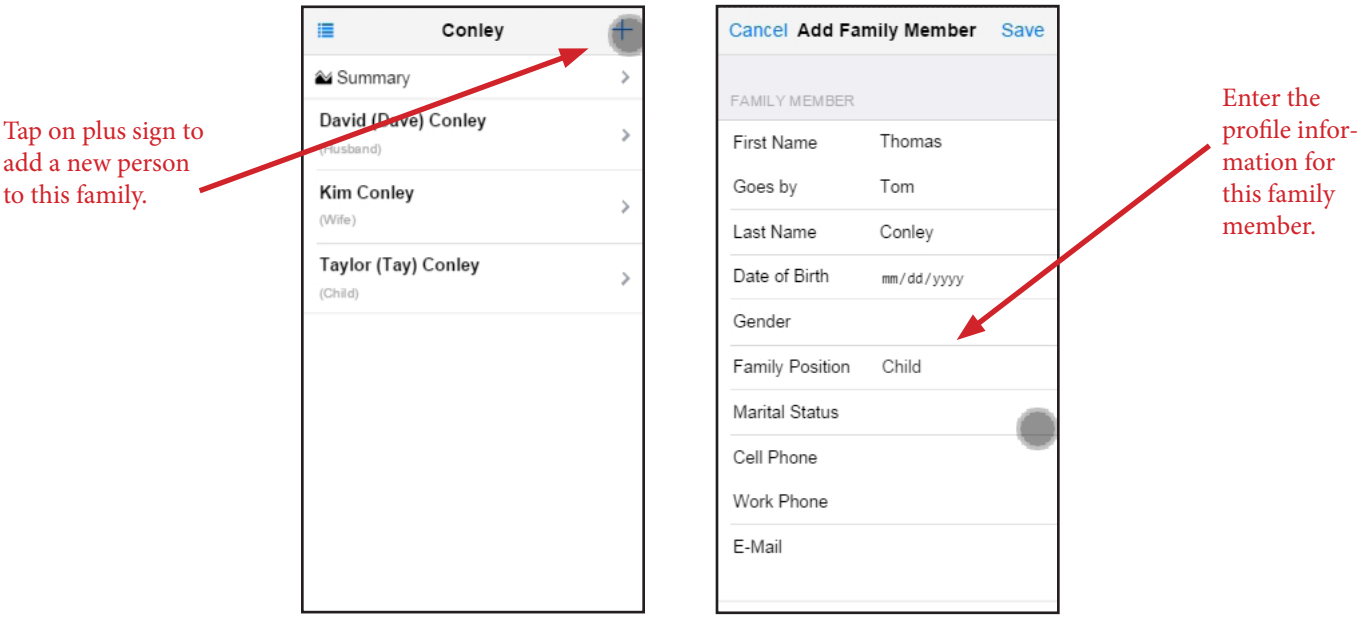


4. Update the necessary information such as address, home phone or family email address.
5. Tap on SAVE in the upper right to save your changes.

Add New Family Member

To add a new person to your family, do the following:

1. From the list of family members, tap on the plus sign in upper right.
2. Enter the information about this person, name, gender, birthdate, etc.
3. Tap on SAVE in the upper right.



Upload Picture

To upload a profile picture for a person in the family, do the following:

1. Tap on the name of the family member for which you'd like to upload a picture.
2. Tap on the head image to the left of the person's name.
3. Navigate to the image file you'd like to upload.
4. Tap SAVE in the upper right.

Tap on the head image to pull in a picture of this person.

Contributions

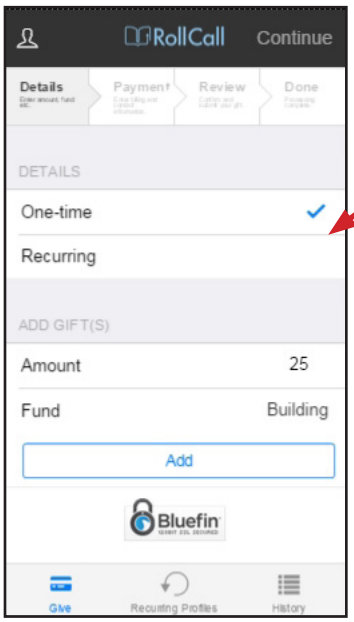
When you first log onto Roll Call Connect, you will be anchored on the Home Page which lists your family members.

Give Online

To make an online donation, do the following:

1. Tap on hamburger menu in the upper left
2. Tap on the Donate Now menu itm.
3. Choose between a "one time" or "recurring" gift type
4. For "one time" gifts, enter the following information.
    a. Enter the *Amount* of the gift.
    b. Enter the *Fund* that the gift should be designated to.
    c. Tap the ADD button.
    d. Tap Continue in the upper right.

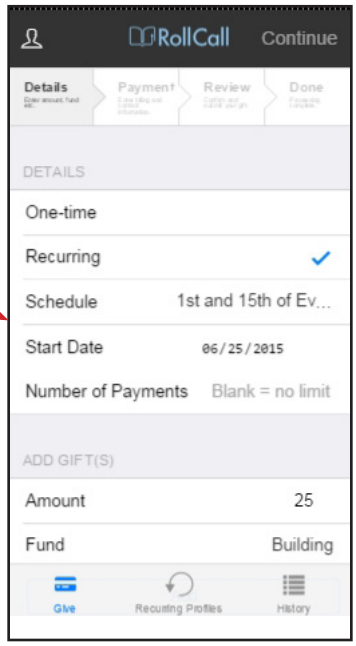
Tap on Donate Now to give online.



Mark either one time or recurring gift.

5. For a "recurring" gift, enter the following information
    a. Select the *Schedule* type (when you want the gift to re-occur).
    b. Enter the specific date if applicable.
    c. Enter the *Start Date.*
    d. Enter the number of times you'd like this gift to occur. Leave this field blank if there is no end date.
    e. Enter the Amount of the gift.
    f. Enter the Fund that the gift should be designated to.
    g. Tap the ADD button.

Enter how often and when you'd like your recurring contribution to "hit".

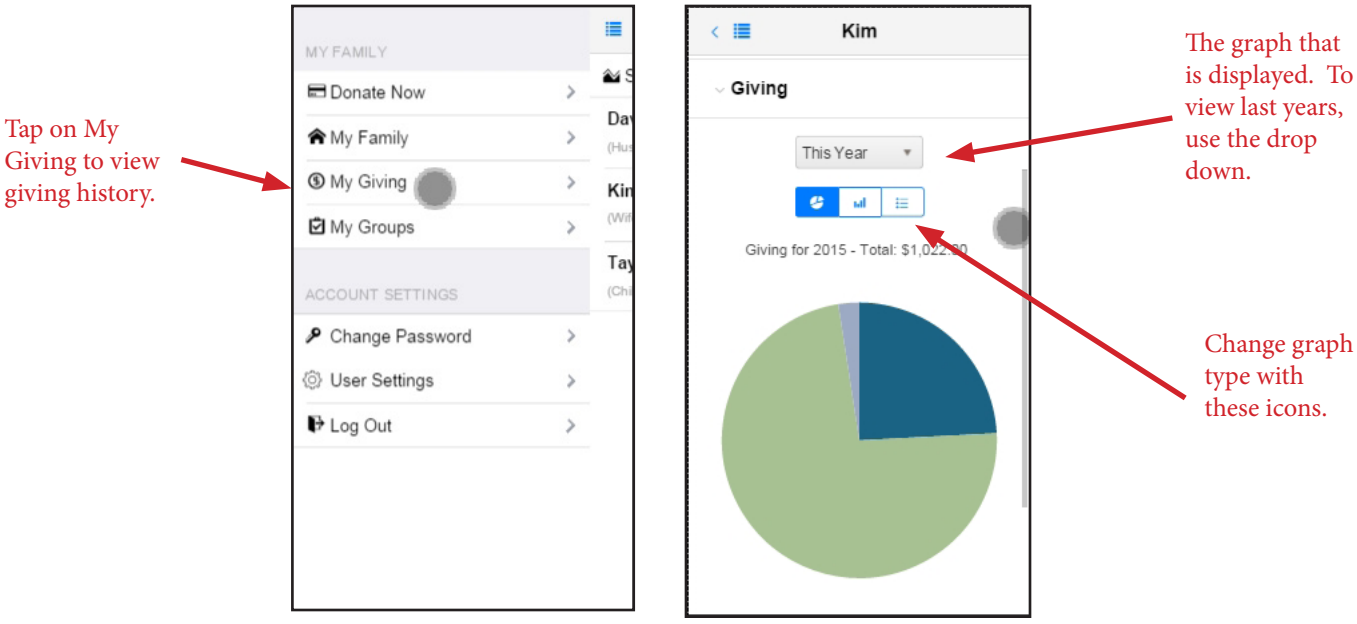


6. Once you've added all the gifts you'd like to, move on to the payment section.
7. Enter the *Card Number*.
8. Enter the *Expiration Month*.
9. Enter the *Expiration Year*.
10. Enter the *CSV code*.
11. Tap CONTINUE.
12. At this point, you may review your online gift. If everything looks correct, tap SUBMIT. If you need to make changes, Tap EDIT.

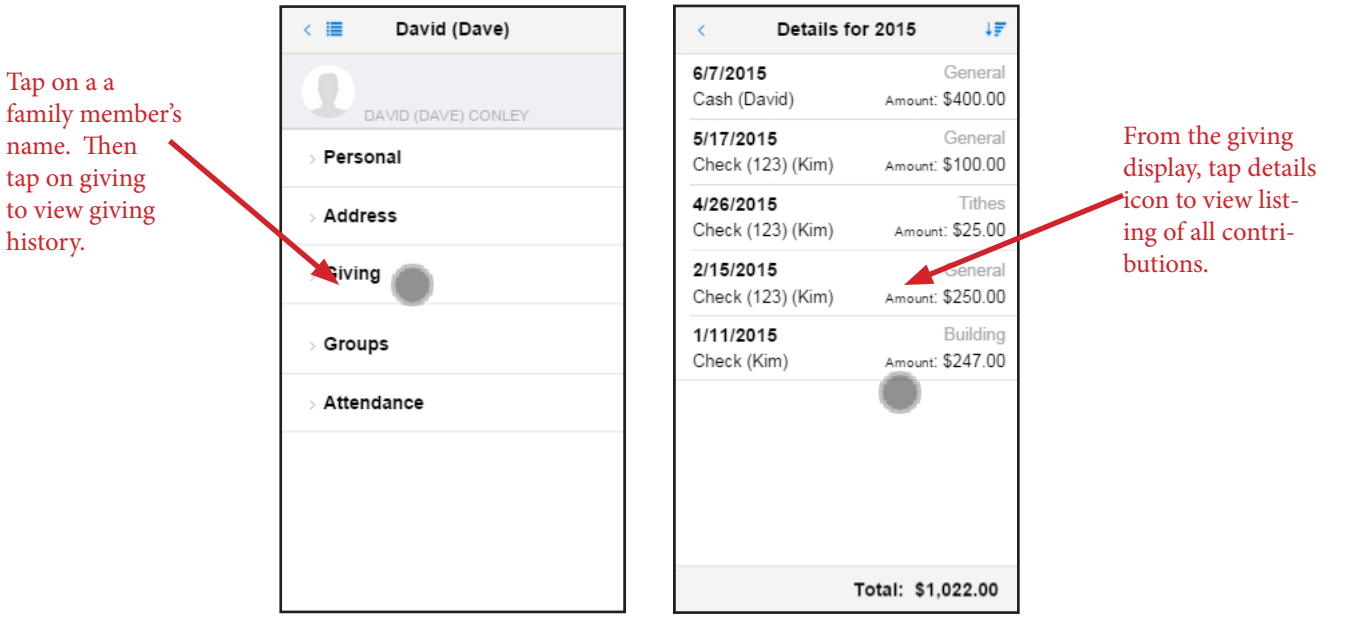
View Giving History

There are several ways to view the giving information. You can tap on the *Summary* link above the family members names. That will take you to a graph of your giving history. You can use the drop down to change from this year to last year. You can also click on the icons for different chart types.

Another option for viewing giving information would be to click on the hamburger menu in the upper left. Tap on My Giving. A pie chart with this years giving is displayed. Use the drop down to switch between This Year and Last Year's giving. You can also click on the bar chart icon to view the information in a bar chart format or tap on the details icon to view a listing of each individual gift.



The final option for viewing giving history is to tap on the family members name. Then tap on Giving to expand that section. You will see the pie chart for this years giving. Use the drop down to choose last year, to view last years giving. You may tap on the bar chart icon to view the information in a bar chart format. Tap on the details icon to view a listing of each individual gift.



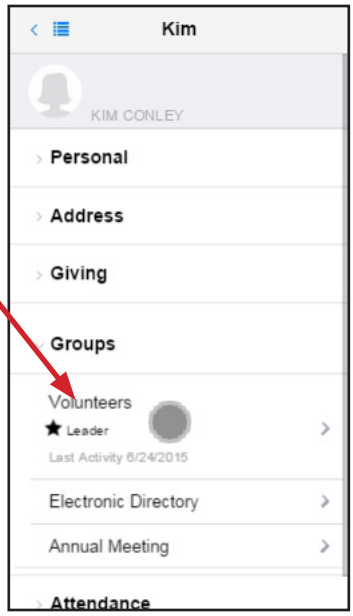
Groups

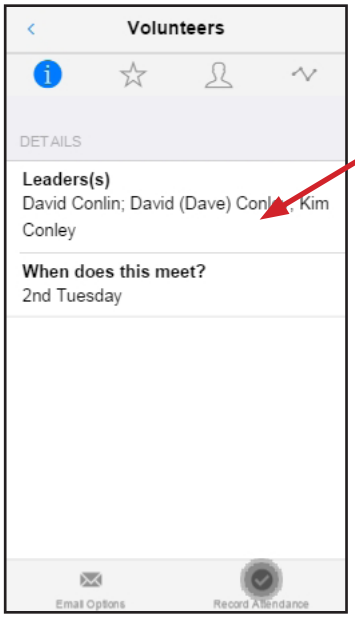
There are several ways that you can access group information in Connect. You can tap on the hamburger menu, then tap on My Groups to view a list of groups that you are involved in. Another way to access that information is to tap on your name from the list of family members, then tap on Groups to view the list of groups.

View Group Details

To view the details of the group, tap on the name of the group. You will be anchored on the information page for that group. The group details will be displayed. The information displayed for each group is determined by the Connect settings in Roll Call.

From the list of groups, tap on the group name to view the details.





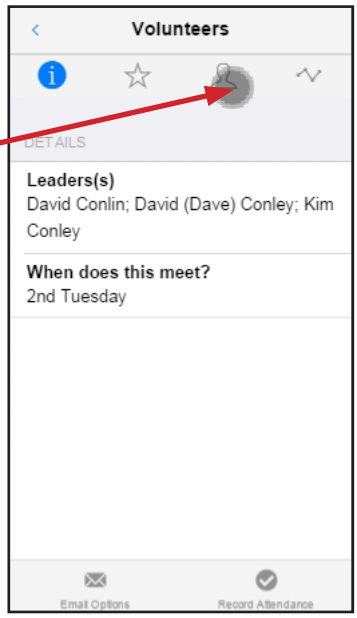
Group details/

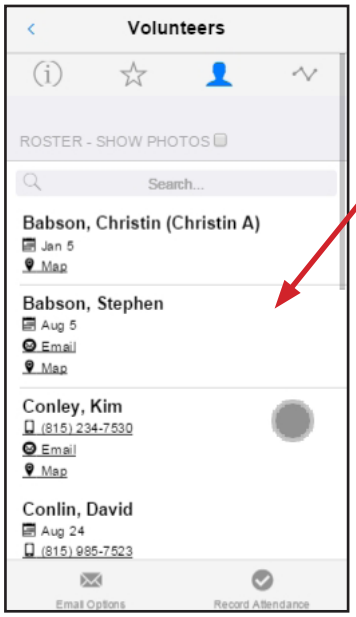
Look up Group Roster

To view a list of people that are involved in the group, tap on My Groups from the hamburger menu in the upper left. Tap on the group name. Tap on the roster icon (looks like a head). This will display all the group members, their birthday, an email link, map link and cell number. The pictures of the group members may also be displayed by marking the box *Load Roster Photos*.

The Roll Call Connect settings will determine if the Roster is available to all group members or just the leaders and administrators of the group.

Tap on Roster icon to view group members.





Roster for this group.

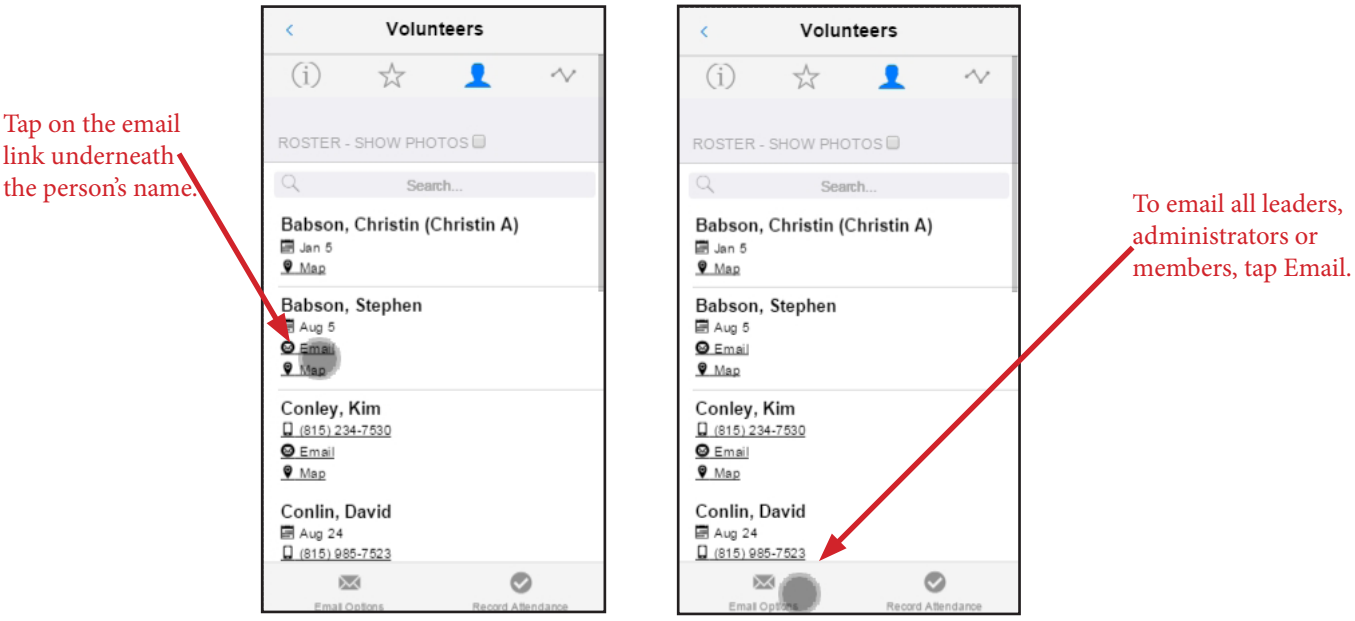
Map to Group Members Home

To view a list of people that are involved in the group, tap on My Groups from the hamburger menu in the upper left. Tap on the group name. Tap on the roster icon (looks like a head). This will display all the group members, their birthday, an email link, map link and cell number. Tap on the Map link for the person you'd like directions to their home.

Email Group Member(s)

To email a specific group member, do the following:

1. Tap on My Groups from the hamburger menu in the upper left.



2. Tap on the specific group name.
3. Tap on the Roster icon.
4. Tap on the Email link underneath the person's name that you'd like to email.
5. Your email program will be displayed with the person's email address in the To section.
6. Compose your email and Tap SEND.

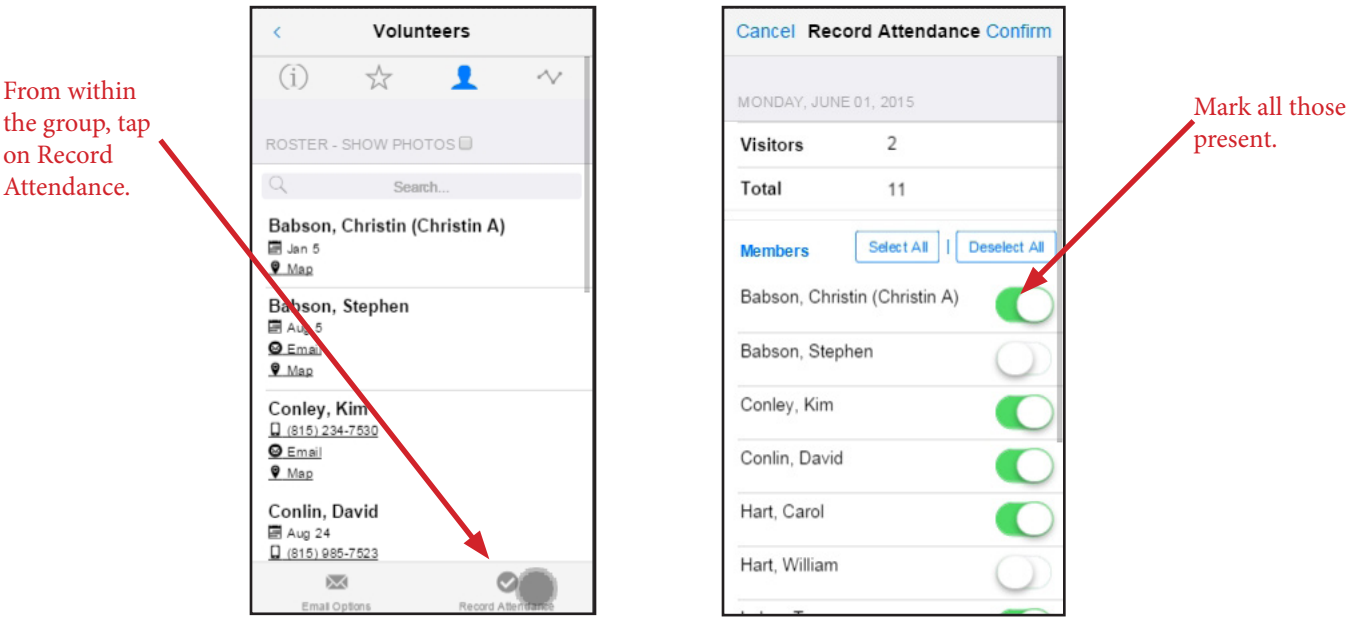
To email all group members, leaders or administrators, do the following:

1. Tap on my Groups from the hamburger menu in the upper left.
2. Tap on group name.
3. Choose your selection in the *Email Options* in the lower left of the window.
4. Your email program will be displayed with the member's email addresses in the To section.
5. Compose your email and Tap SEND.

Record Attendance

If you are the leader or administrator of a group, you will be able to record attendance for the group. To record attendance for the group, do the following:

1. Tap on my Groups from the hamburger menu in the upper left.



2. Tap on group name.
3. Tap on the RECORD ATTENDANCE in the lower right.
4. Choose the date you are recording attendance for.
5. Mark each person that was present.
6. If you had visitors attend the meeting that are not listed in your group, enter that number in the *Visitors* box.
7. Tap CONFIRM to record the attendance data.

USING CONNECT ON A PHONE

STAFF MEMBERS

In addition to the functionality available to your congregation, staff members will have access to additional information and functionality:

1. View various attendance and contribution summary reports.
2. Look up contact information for families in your congregation.
3. Add additional families to Roll Call.
4. Update profile information for your congregation.
5. Email folks in your congregation.
6. Enter and view visitation notes.
7. Enter and view confidential comments.

Based on your church's Roll Call settings some of these functions may not be available.

Logging into Roll Call Connect

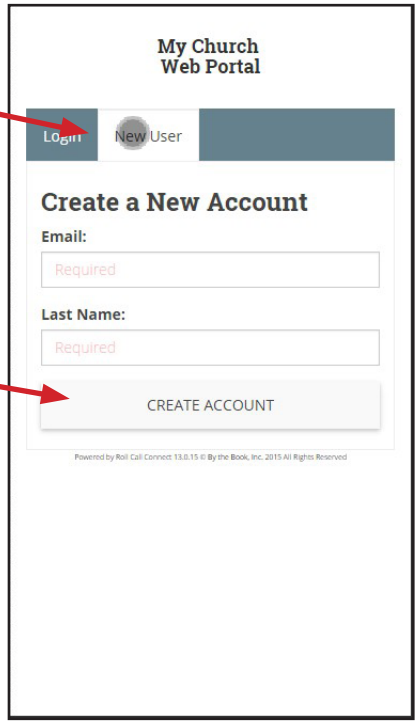
To access Roll Call Connect, the user must login from your phone's browser. The URL for the login page will be the ip-address of the Roll Call Server machine followed by "/co", for example http://your-ip-address/co . Ideally that ip address will be fixed and you'll have a "Login" link on your website pointing to that page.

If you have not created a Connect account yet, you'll need to do that:

1. Tap the NEW USER tab.
2. Enter your *Personal Email* address.
3. Enter your *Last Name*.
4. Tap CREATE ACCOUNT.

Tap on NEW USER.

Enter email and last name, then tap CREATE ACCOUNT.

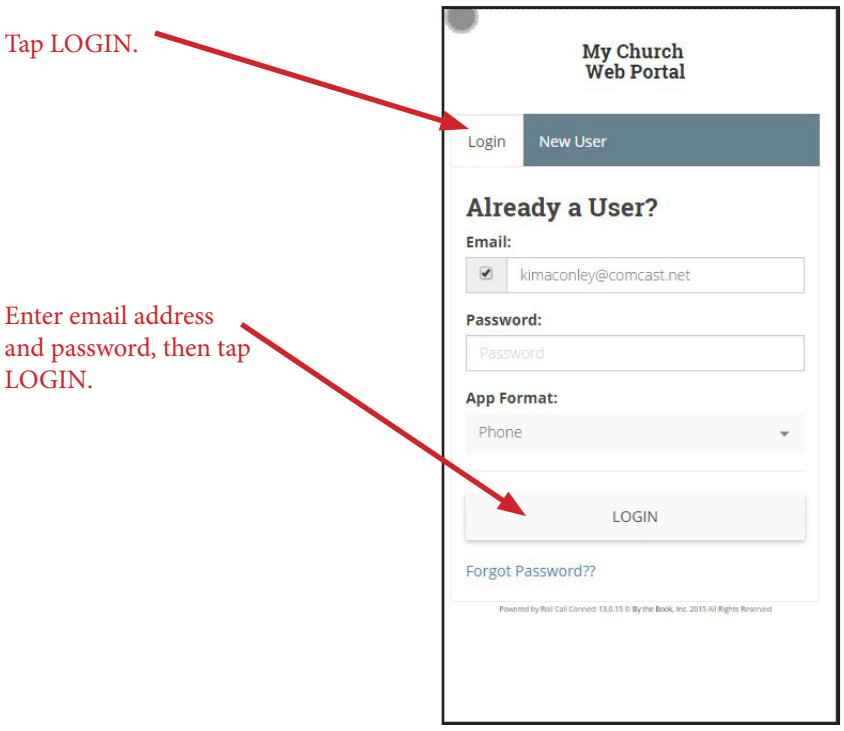


5. If the system finds a match between that email address and last name, you will receive an email with a link to set your password. This person must be marked as a staff member in Roll Call for this functionality to be available to them.

6. From your email program, click on the link in the email. It will take you to a page to set your password.

You are now ready to log in and start using Connect.

To log into Connect, do the following:
1. Make sure you are anchored on the Login tab.
2. Enter your *User Name* (email address).
3. Enter your *Password.*
4. Choose the *App Format* (Phone).
5. Click LOGIN.



Forgot Password

If you have created a Connect username, but have forgotten you password, simply click on the *Forgot Password* link from the login screen. You'll be prompted to enter your email address and last name. Enter that information and click SEND LINK. An email will be sent with a link to update your password.

Change Password

If you would like to change your password:
1. Log into Connect.
2. From the hamburger menu in the upper left, tap on the Change Password option.
3. Enter a new password.
4. Enter the new password again in the *Confirm* box.
5. Tap CONFIRM.

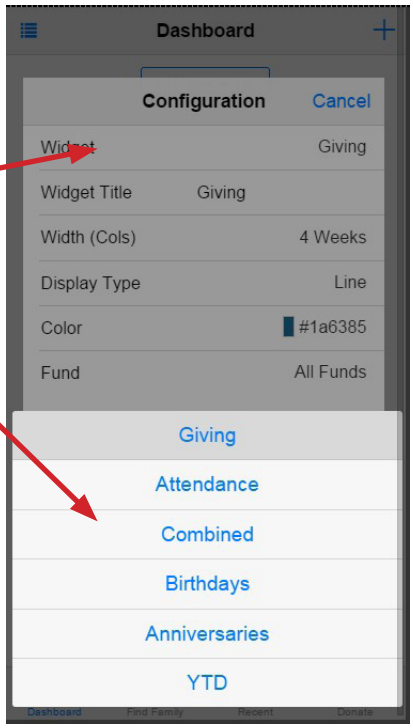
Setting Your Dashboard Widgets (reports)

There are a variety of reports or "widgets" that can be displayed on your home page once you log into Roll Call Connect. Each staff member will have the opportunity to customize their dashboard to display the widgets they are interested in. The permissions set for each staff user will dictate which widgets will be available for them to choose.

To add widgets to your dashboard, do the following:

1. Tap on the ADD WIDGET button.
2. On the configuration page, tape in the *Widget* field, choose the type of report from the list.

Tap the in the widge field, then choose from the list that is displayed.



3. Give the widget a *Title*.
4. Choose the *Width* for the report. You will have a choice to display 4, 8 or 12 weeks for the Giving, Attendance, Combined and YTD widgets.
5. Choose the *Display Type* and *Color*.
6. Enter any specific criteria based on the type of widget. For example on the Giving Widget, you can specify certain funds.
7. Tap CONFIRM to add the widget to your dashboard.

The following are the different types of widgets/reports that are available:

Giving

The Giving widget will display weekly giving totals for all funds, or giving for one specific fund.

Attendance

The Attendance widget will display weekly head count or people count totals for the week. You can further define it for a specific campus, attendance type (service or group) and department.

Combined

The Combined widget graphs both attendance and giving data. You can further define it for a specific campus and fund.

Birthdays

The Birthday widget will display how many people have a birthday today, this week and next. When you click on that number, you will get a list of the people and their birthday.

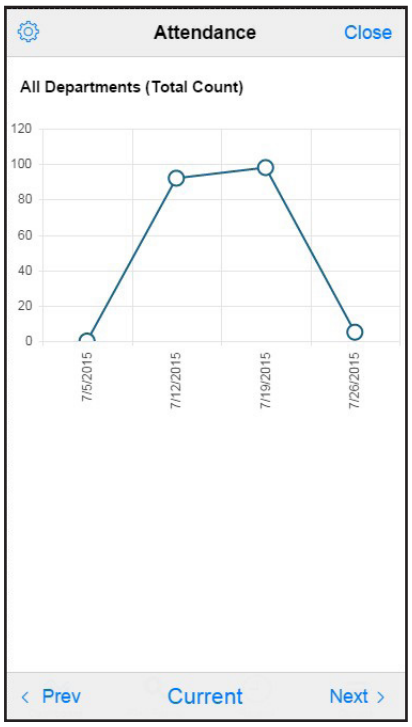
Anniversaries

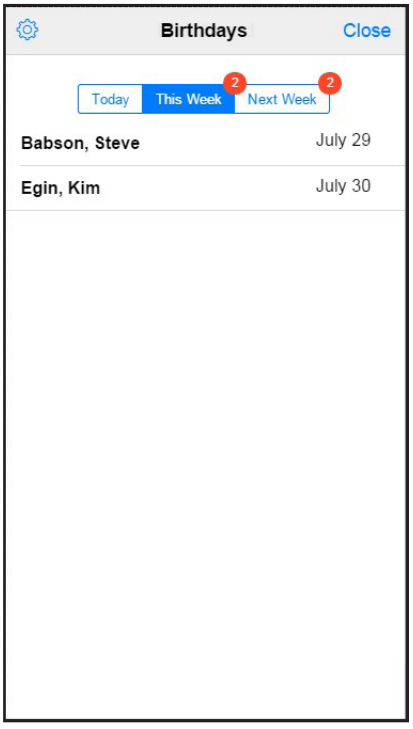
The Anniversary widget will display the number of families that have an anniversary today, this

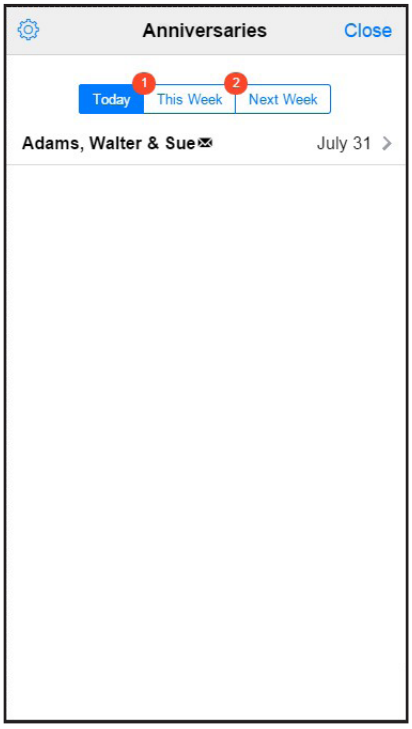
week and next week. When you click on the number, you will get a list of the couples and their anniversary.

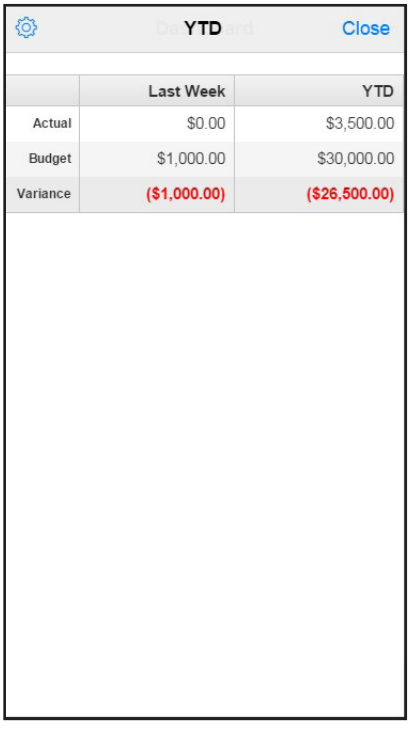
YTD

The YTD widget will compare actual giving to budgeted giving. The first column will display last weeks giving figures. The second column contains Year to Date totals and budget amounts.







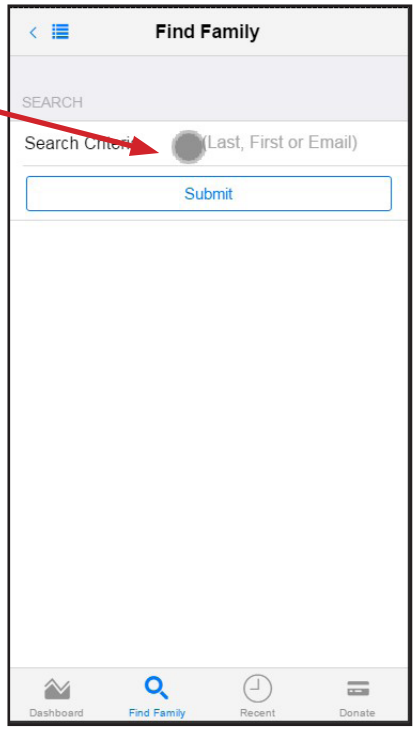


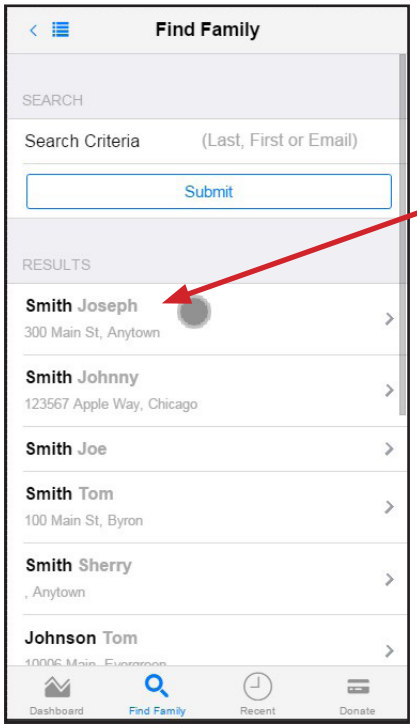
To remove a widget from your dashboard, simply click/tap on the trash can icon to the on the right side of the widget. To modify your widget, click or tap on the gear icon. Enter the new preferences then press CONFIRM.

Looking up a Family

To look up a specific family, tap on the Find Family option on the bottom of the page. Or tap the hamburger menu in the upper left and choose Find Family. Type the last name in the search box, tap SUBMIT to view results. Tap on the name of the person you'd like to view details for.

Enter last name, then tap SUBMIT.



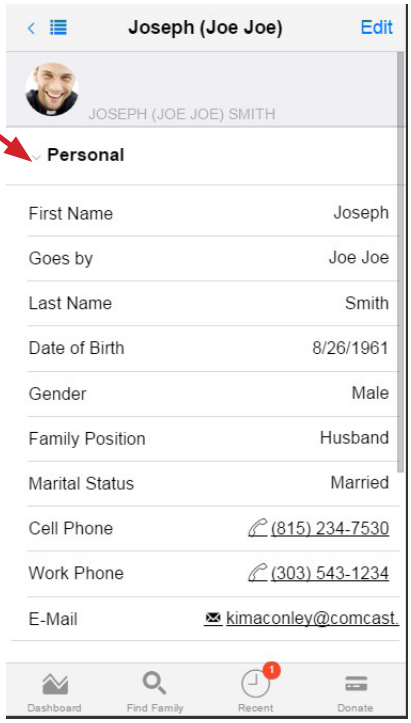


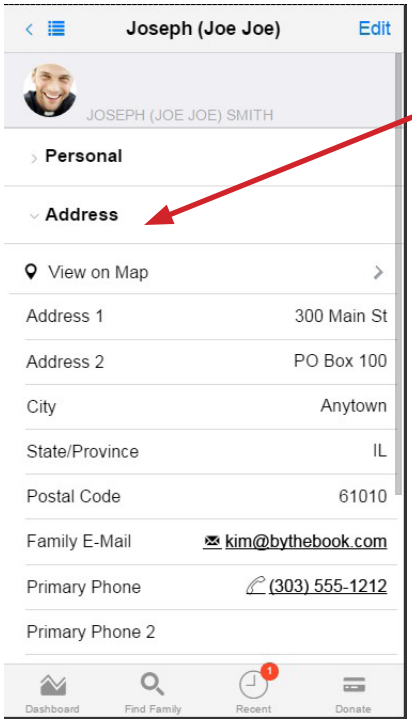
From the list of results tap on the name of the person you are searching for.

Contact information

Once you've selected a family from the search results, you will see a list of family members. Tap on one of the family members to view their profile information. Tap on Personal to view personal profile type information like email, cell phone birthdate. Tap on Address to view the address or family type information

From the individuals profile, tap on personal.



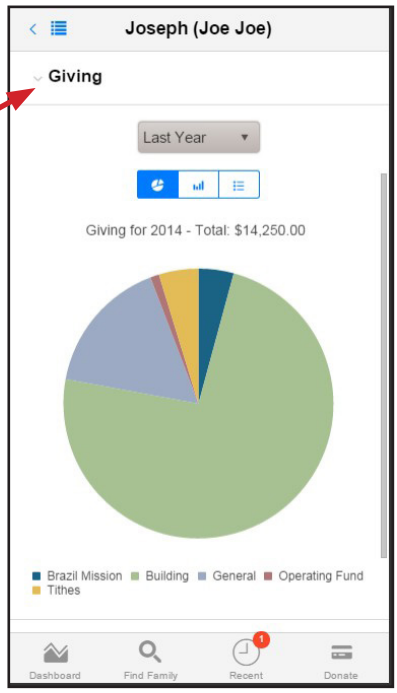


To view address information, tap on address from individuals profile.

Giving

Once you've selected a family from the search results, you will see a list of family members. Tap on one of the family members to view their details. To view their giving history, tap Giving. Depending on your user permissions, this tab may or may not be available.

Tap giving, from within a profile to view giving history information.



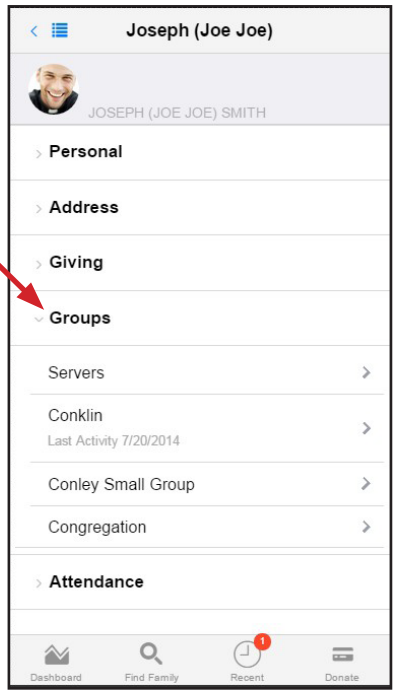
Groups

Once you've selected a family from the search results, you will see a list of family members. Tap on one of the family members to view their details. To view the groups they are involved in, tap Groups. To view the details of that group, tap the group name.

Attendance History

Once you've selected a family from the search results, you will see a list of family members. Tap on one of the family members to view their attendance history, tap Attendance.

Tap on Groups from within a person's profile to view group involvements.



Tap on Attendance from wtihin a person's profile to view their attendance history.

Updating Family Information

To update contact information, add a new family member or upload a picture, you'll first need to pull up the person's record. To do that, tap on the Find Family option on the bottom of the page. Or tap the hamburger menu in the upper left and choose Find Family. Type the last name in the search box, tap SUBMIT to view results. Tap on the name of the person you'd like update.

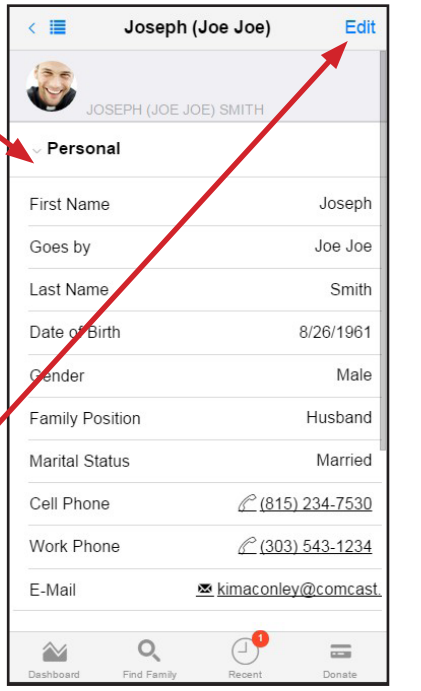
Update Profile/ General Information

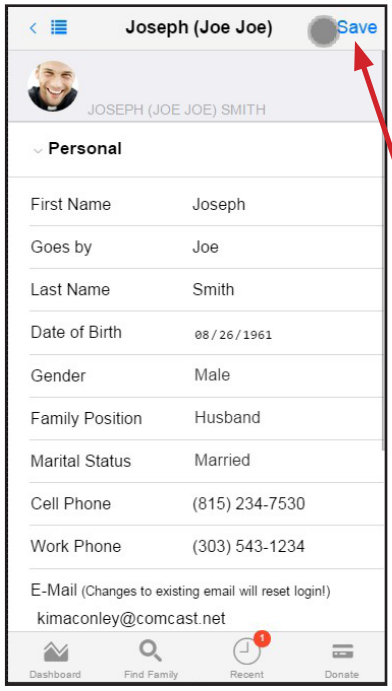
To update the personal profile information:

1. Tap on family members name.
2. Tap Personal to expand that area.
3. Tap Edit on the top bar.
4. Update the necessary information such as name, birthday, cell phone etc.
5. Tap SAVE in the upper right.

From the individuals profile, tap on personal.

Tap EDIT.





Tap SAVE to make the changes.

Update Address Information

To update the address or family type information:

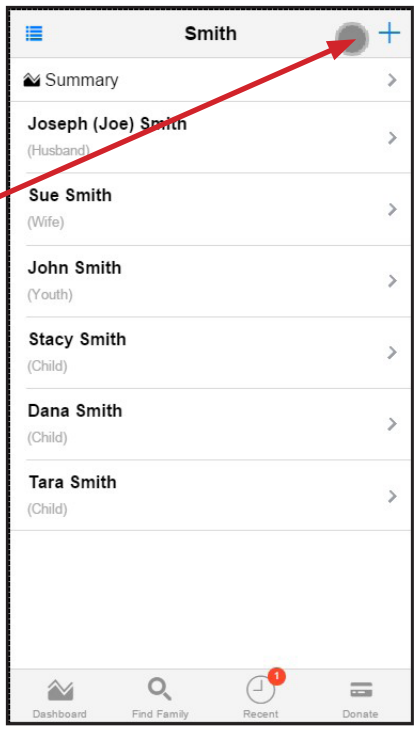
1. Tap on any family members name.
2. Tap the Address section.
3. Tap EDIT in the upper right.
4. Update the necessary information such as address, home phone or family email address.
5. Tap SAVE in the upper right.

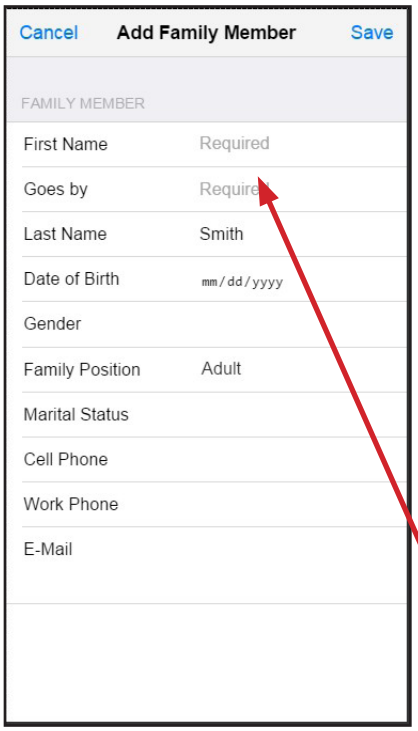
Add New Family Member

To add a new person to an existing family, do the following:

1. Find the family using the Find Family menu option.
2. From the page that lists all the family members, tap the plus sign in the upper right.
3. Enter the information about this person, name, gender, birthdate, etc.
4. Tap SAVE in the upper right.

From the list of family members, tap on the plus sign to add to the family.



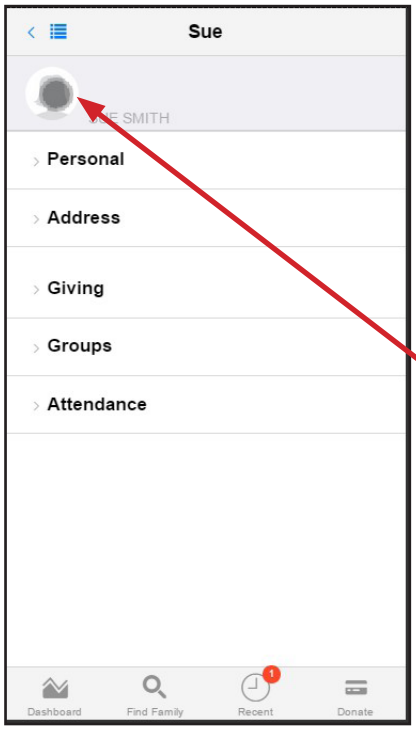


Enter the profile information for the new family members. Tap SAVE when you are done.

Upload Picture

To upload a profile picture for a person in the family, do the following:

1. Tap on the name of the family member for which you'd like to upload a picture.
2. Tap on the head image to the left of the person's name.
3. Navigate to the image file you'd like to upload.
4. Click SAVE button.



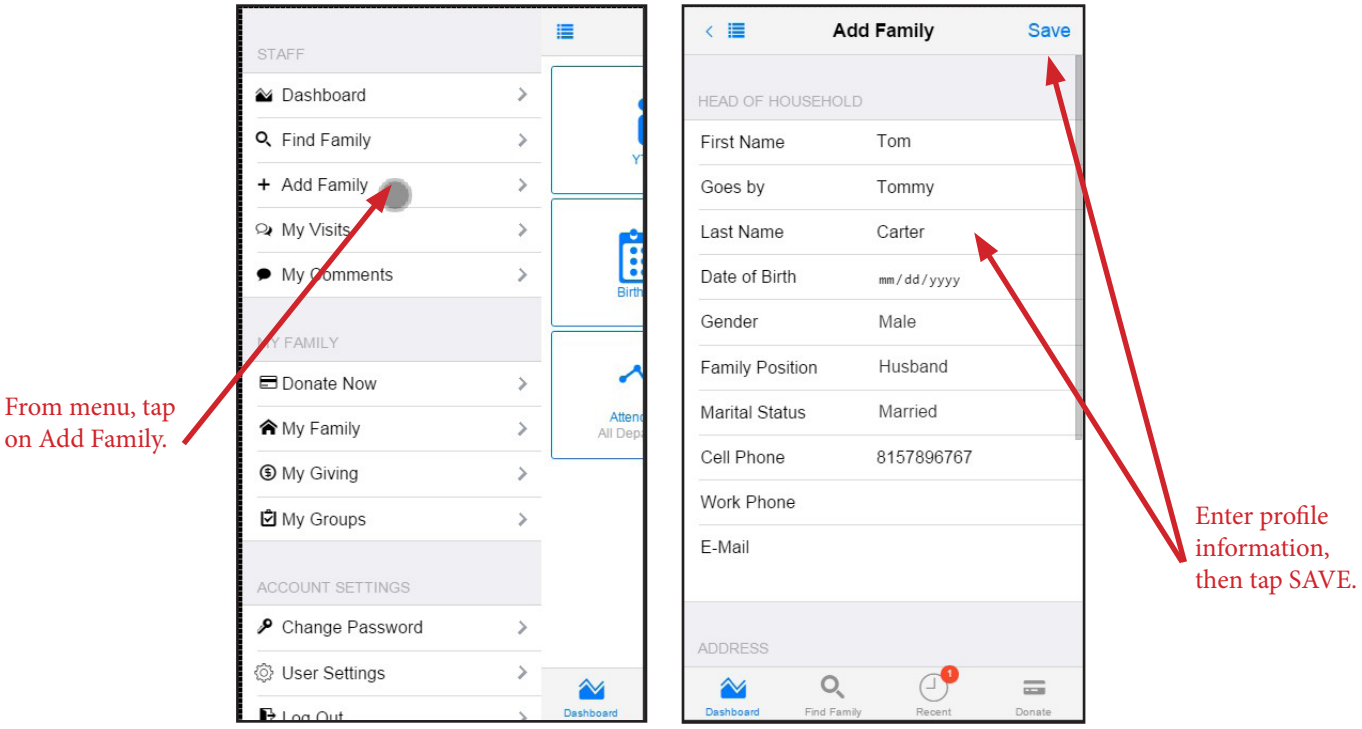
Tap on the head image to upload a picture.

Add a New Family to Database

To add a new family into Roll Call, tap on the hamburger icon on the left side. Choose the option to Add a Family. This will bring up a form for you to enter the basic contact information for the head of the family. Once you've entered that information, make sure to click or tap SAVE in the upper right of the window.

Add additional family members

If there are additional family members to be added to the family, click or tap the plus sign upper right portion of the window. This will open up a form for you to enter the personal profile information for the additional family member.



Sending Email

Within Roll Call Connect, you'll be able to send email to an individual or group. Your device's default mail program will be returned with the To addresses filled in.

An Individual

To send an email to a specific person, do the following:

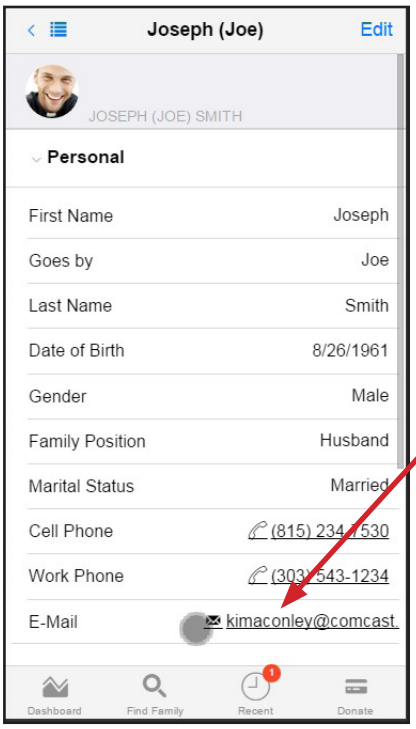
1. Tap Find Family on the bottom menu.
2. Type in the last name of the individual in the search box.
3. Tap SUBMIT.
4. Select the appropriate family from the results box.
5. Tap the individuals name from the family members list.
6. Expand the Personal section.
7. Tap on the email address.
8. From your email program, compose and send your email.

A group of people

To email a specific group member, do the following:

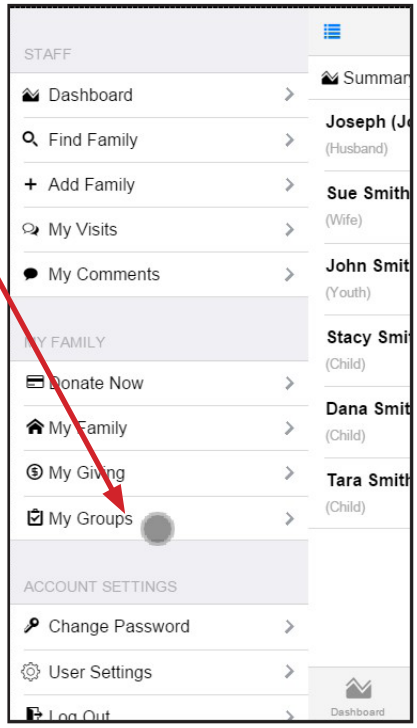
1. From the hamburger menu in upper left, choose My Groups.
2. Tap on the group that the person is involved in.
3. Click on the Roster icon at the top.

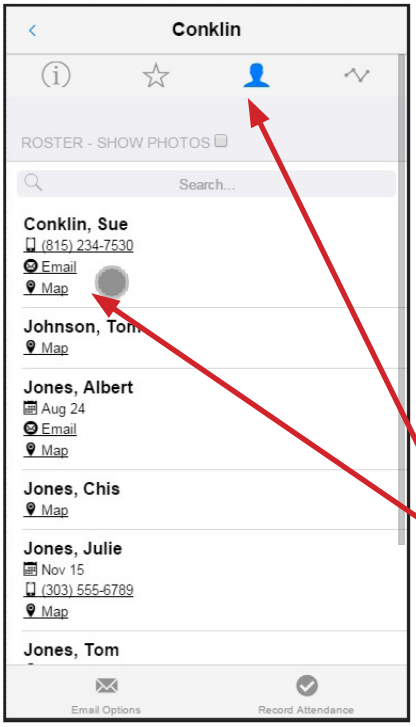
4. Click on the Email link underneath the person's name that you'd like to email.
5. Your email program will be displayed with the person's email address in the To section.
6. Compose your email and click SEND.



Tap on personal email address to send an email to an individual.

From menu, choose My Groups, then choose appropriate group.



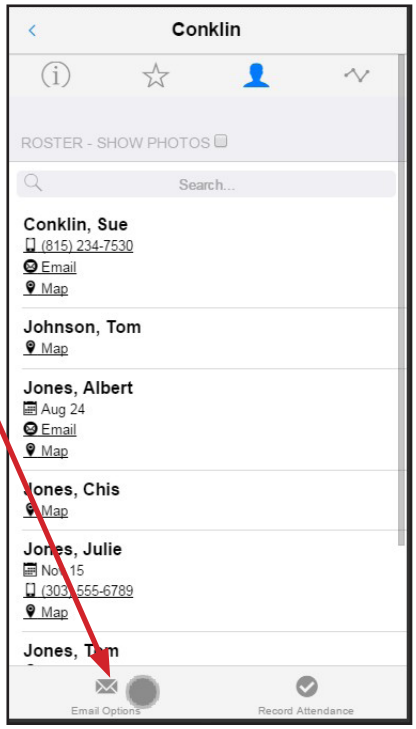


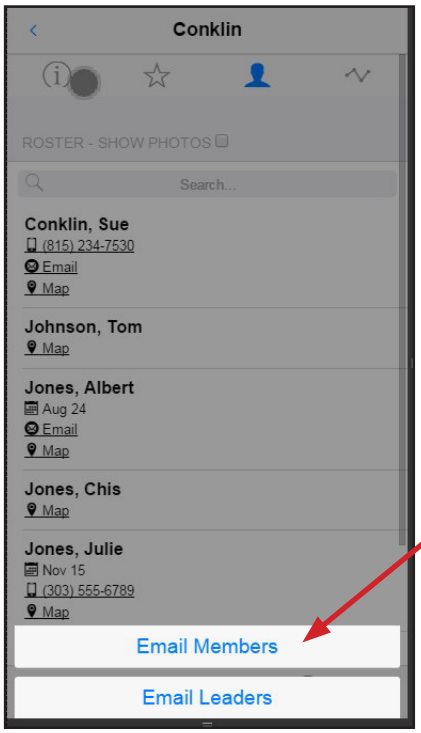
From the roster, tap on the email link of the person you wish to email.

To email all group members, leaders or administrators, do the following:

1. From the hamburger menu in the upper left, choose My Groups.
2. Tap on the Group Name.
3. Choose your selection in the *Email Options* at the bottom of the window.
4. Your email program will be displayed with the member's email addresses in the To section.
5. Compose your email and click SEND.

From within the group roster, tap on EMAIL OPTIONS.



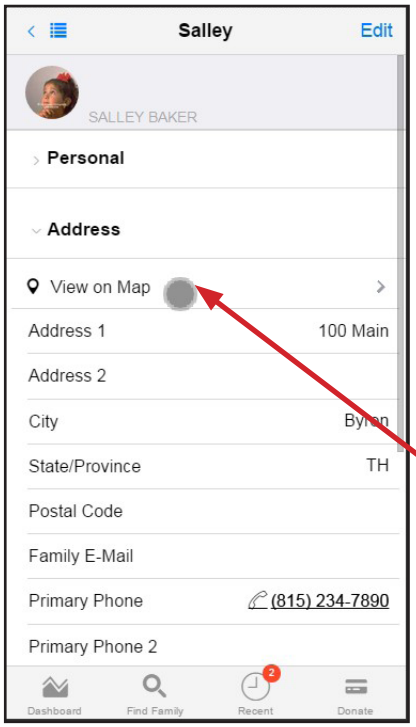


Choose who you'd like to send the email to.

Getting Directions (map)

To view a map of families address, you'll first need to pull up that families profile information. Do the following:

1. Tap Find Family on the bottom menu.
2. Type in the last name of the family the search box. Tap SUBMIT.
3. Select the appropriate family from the results box.
4. Tap on a family members name.
5. Expand the Address section.
6. Click or tap on VIEW ON MAP.
7. This will bring up your default maps program with the address highlighted.



From wtihin the address area of a person's record, tap on View on Map.

Visitation Notes

Visitation notes may be added or viewed in several different ways:

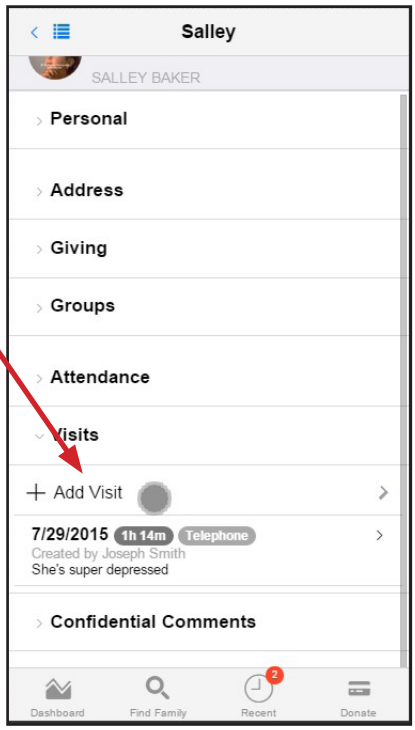
1. From within a person's profile information.
2. From the My Visits menu.

Enter visitation notes

To enter visitation notes, from an individual's record do the following:

1. Tap the Find Family menu at the bottom of the page.
2. Enter the Last Name of the family.
3. Tap SUBMIT.
4. Tap on the name of the individual you need to enter visitation notes.
5. Expand the Visits section.
6. Tap ADD VISIT button.
7. Enter the *Date* of the visit.
8. Enter the *Type* of visit (phone, in person, etc).
9. Enter the *Notes* for the visit.
10. Tap SAVE at the bottom to save the information.

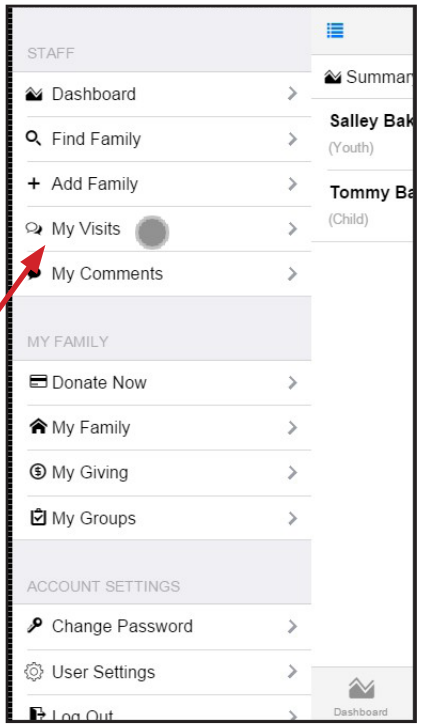
Tap on Add Visit to enter additional visitation notes.



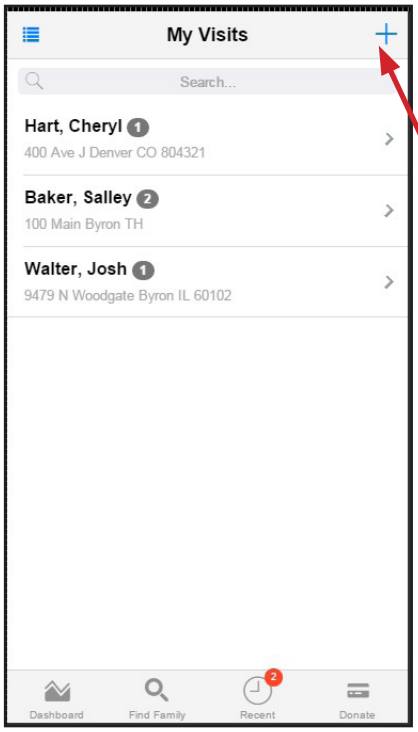
Enter visitaiton notes.

To enter visitation notes from My Visits, do the following:

1. Tap on my Visits from the hamburger menu in the upper left.
2. Tap on the plus sign in the upper right.
3. Enter the last name of the person you are entering the notes for.
4. Tap on SUBMIT.
5. Tap on the name of the specific person.
6. Enter the *Date* of the visit.
7. Enter the *Duration* of the visit.
8. Enter the *Type* of visit.
9. Enter the visitation *Comments*.
10. Tap the SAVE button at the bottom of the page.



Tap My Visits from menu.



Tap on plus sign to add another visit record.

Look up visitation notes I entered

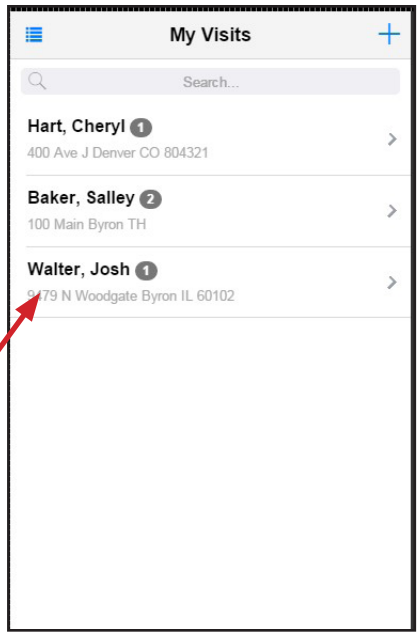
To view the notes that I have entered, do the following:

1. Choose My Visits from the hamburger menu in the upper left.
2. A list of the people who have visitation notes that you've entered are listed.
3. Their visitation notes will be displayed.

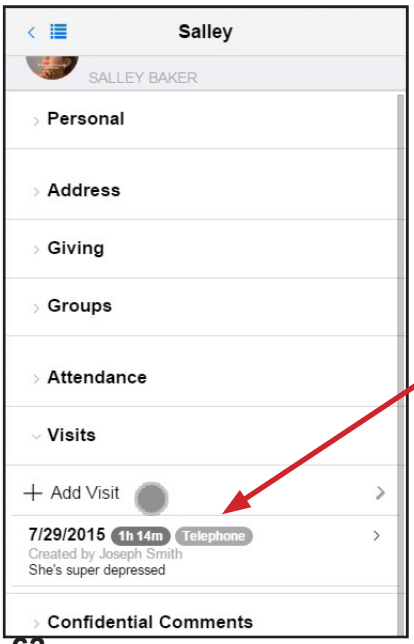
View visitation notes for a specific person

To view visitation notes, from an individual's record do the following:

1. Tap Find Family from the bottom.
2. Type in the last name of the individual in the search box.
3. Tap SUBMIT.
4. Select the appropriate family from the results box.
5. Tap on the individuals name from the family members list.
6. Tap on the Visits section.
7. Their visitation notes will be displayed.



After tapping on My Visits, they will be listed by person.



From within their profile record, tap on visits to view all visitations.

Confidential Comments

Confidential comments may be added or viewed in several different ways:

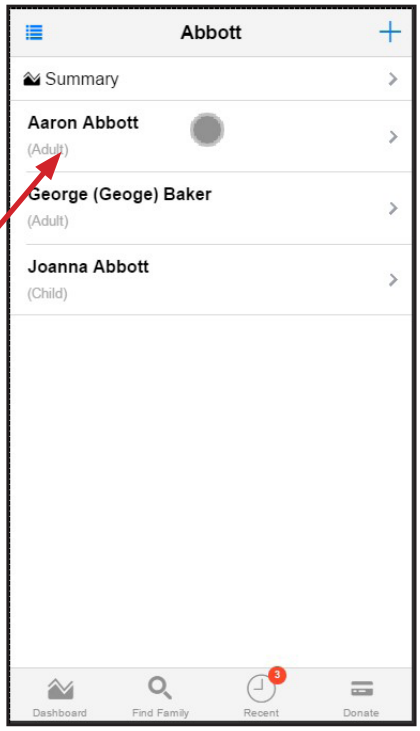
1. From within a person's profile information.
2. From the My Comments menu.

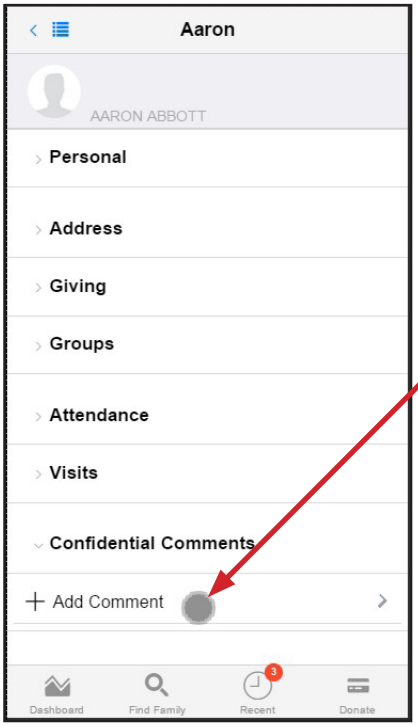
Enter confidential comments

To enter comments, from an individual's record do the following:

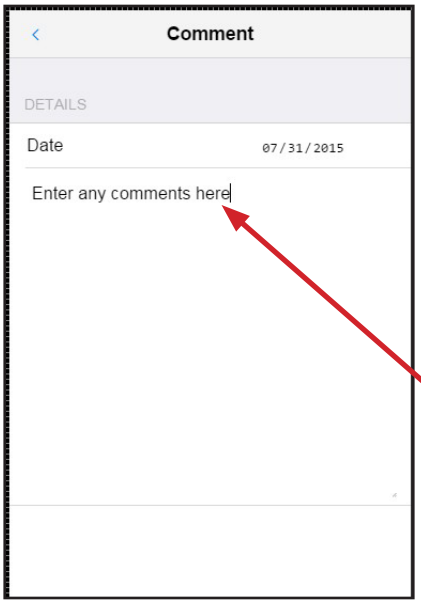
1. Tap the Find Family menu at the bottom of the page.
2. Enter the *Last Name* of the family.
3. Tap SUBMIT.
4. Tap on the name of the individual you need to enter comments for.
5. Expand the Comments section.
6. Tap ADD COMMENT button.
7. Enter the *Date* of the comment.
8. Enter the *Comments*.
9. Tap SAVE at the bottom to save the information.

From the list of family members, tap on the person you wish to view comments.





Expand the comments section, tap Add Comment.

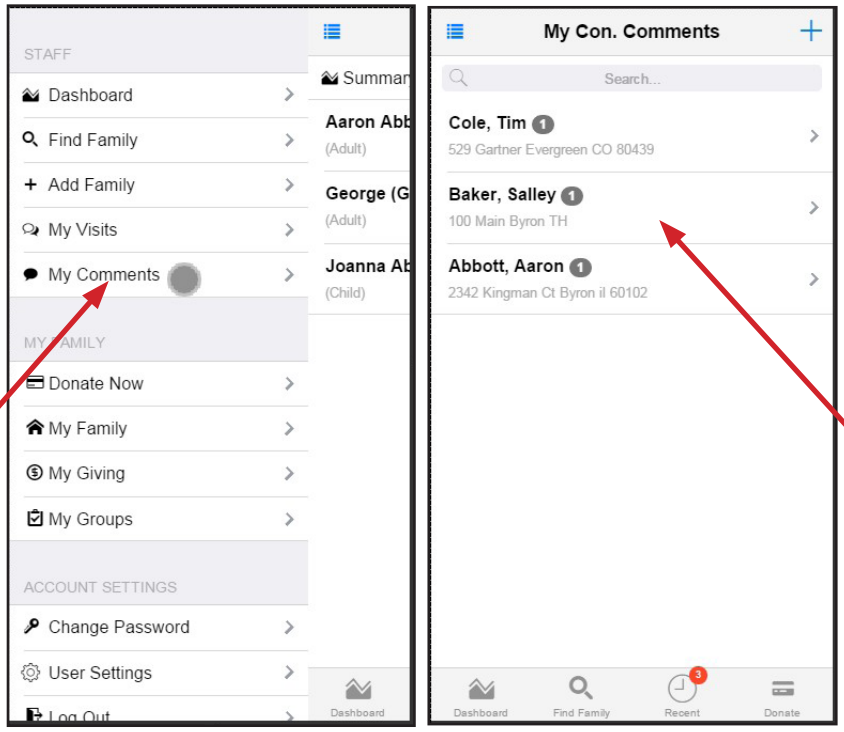


Enter the comments, then tap SAVE at the bottom of the screen.

To enter comments from My Comments, do the following:

1. Tap on My Comments from the hamburger menu in the upper left.
2. Tap on the plus sign in the upper right.
3. Enter the *Last Name* of the person you are entering the notes for.
4. Tap on SUBMIT.
5. Tap on the name of the specific person from the results list.
6. Enter the *Date* of the comment.
7. Enter the *Comments*.
8. Tap the SAVE button at the bottom of the page.

Tap on My Comments from the menu.



All comments that I entered are listed.

Look up confidential comments I entered

To view the comments that I have entered, do the following:

1. Choose My Comments from the hamburger menu in the upper left.
2. A list of the people who have comments that you've entered are listed.
3. Tap to view the comments related to them.

View confidential comments for a specific person

To view confidential comments, from an individual's record do the following:

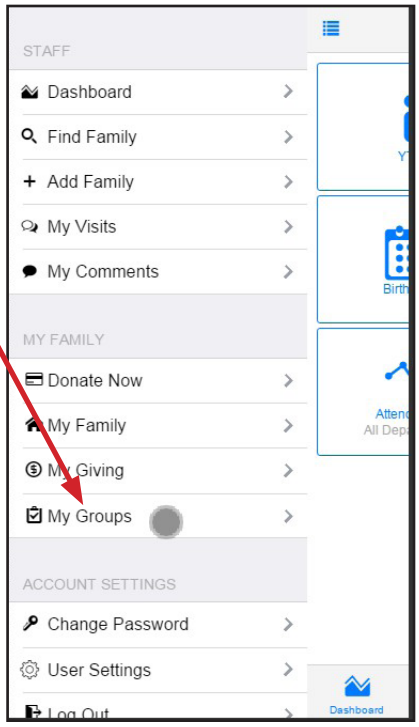
1. Tap Find Family from the bottom.
2. Type in the last name of the individual in the search box.
3. Tap SUBMIT.
4. Select the appropriate family from the results box.
5. Tap on the individuals name from the family members list.
6. Tap on the Comments section.
7. Their Comments will be displayed.

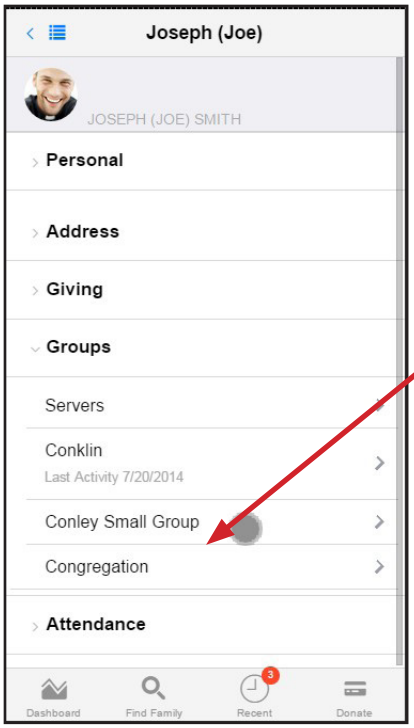
Recording Attendance

If you are the leader or administrator of a group, you will be able to record attendance for the group. To record attendance for the group, do the following:

1. Click on My Groups.
2. Tap on the group you wish to record attendance for.

From the menu, tap on My Groups.

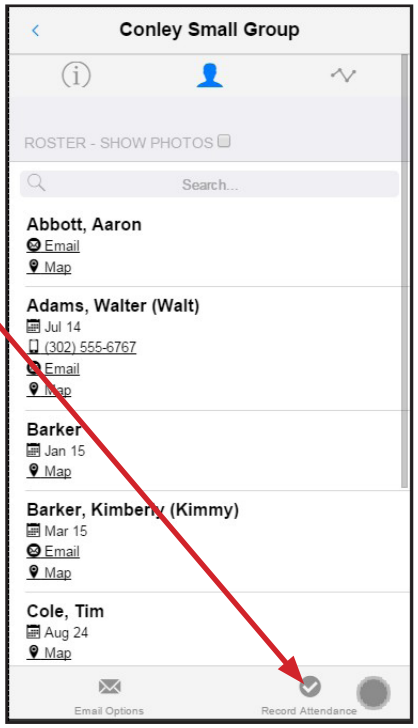


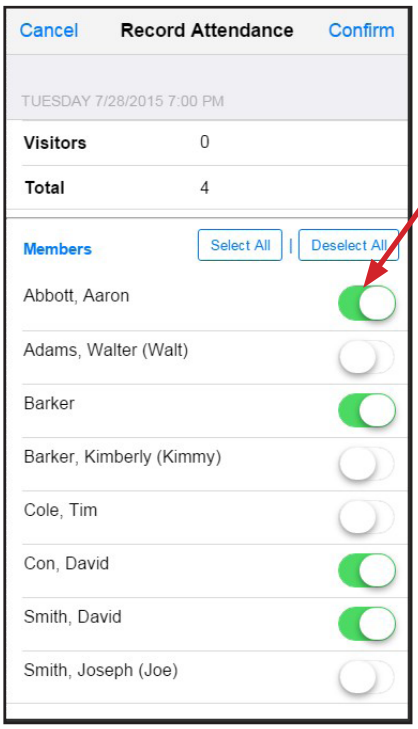


Tap on the group you'd like to record attendance for.

3. Tap Record Attendance at the bottom.
4. Choose the date you are recording attendance for.
5. Mark each person that was present.
6. If you had visitors attend the meeting that are not listed in your group, enter that number in the *Visitors* box.
7. Tap CONFIRM in the upper right to save the attendance.

Tap Record Attendance in the bottom section.





Mark those that are/were present.

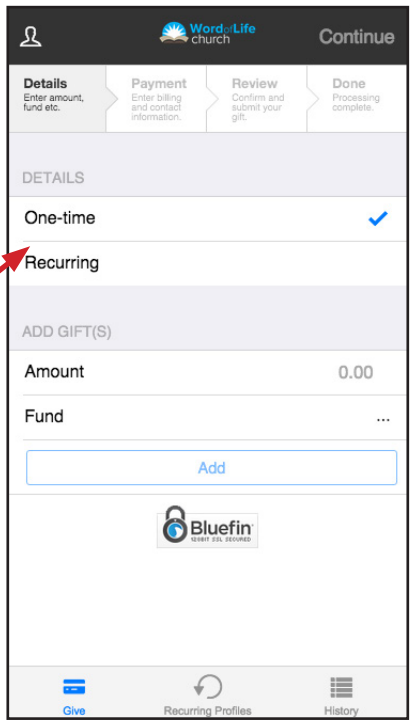
Giving Online

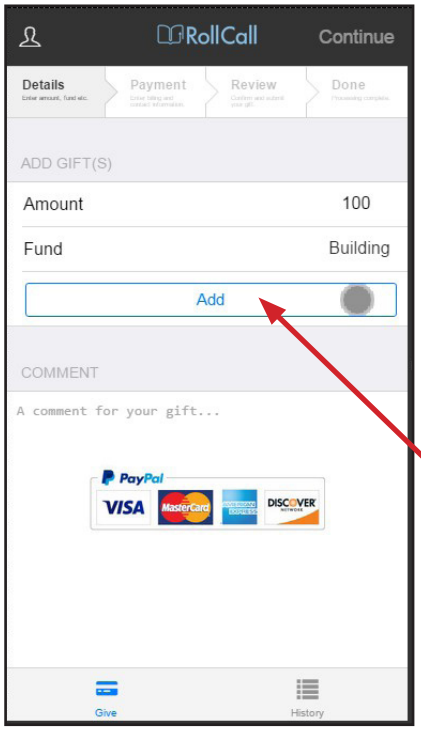
To make an online donation, do the following:

1. Click on the Donate Now menu icon on the left sidebar.
2. Choose between a "one time" or "recurring" gift type
3. For "one time" gifts, enter the following information.
    a. Enter the *Amount* of the gift.
    b. Enter the *Fund* that the gift should be designated to
    c. Click the ADD button

If you are using Bluefin, your donors will see an options for One-Time or Recurring gift.

If you are using Paypal, recurring is not an option.

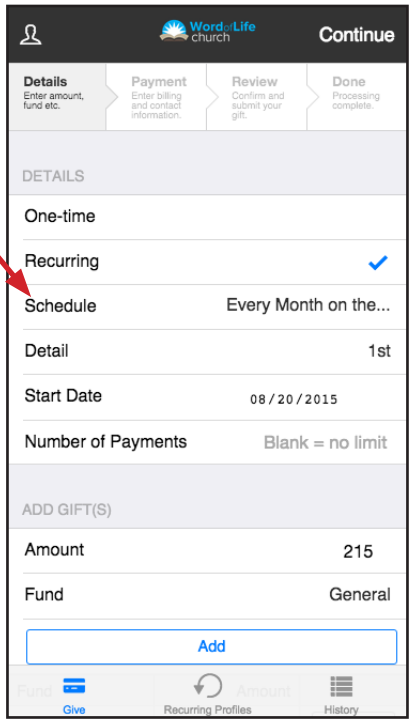




Enter the amount and designated fund. Tap ADD.

4. For a "recurring" gift, enter the following information
    a. Select the *Schedule* type (when you want the gift to re-occur).
    b. Enter the specific date if applicable.
    c. Enter the *Start Date.*

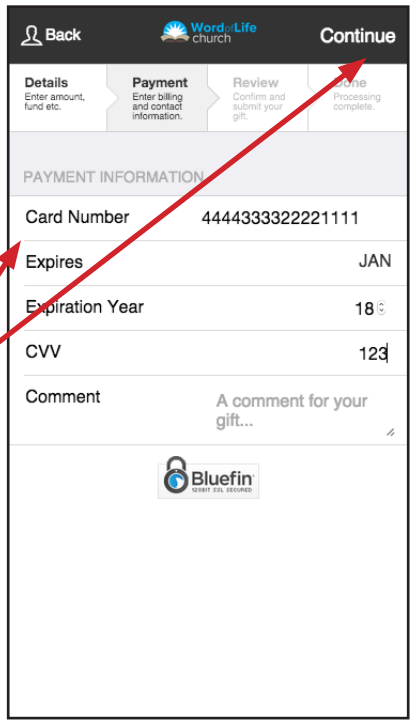
For recurring gifts, choose your schedule.

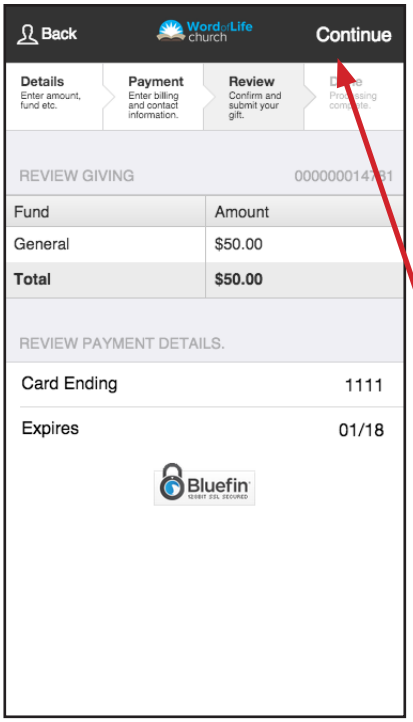


d. Enter the number of times you'd like this gift to occur. Leave this field blank if there is no end date.
e. Enter the Amount of the gift.
f. Enter the Fund that the gift should be designated to.
g. Click the ADD button.

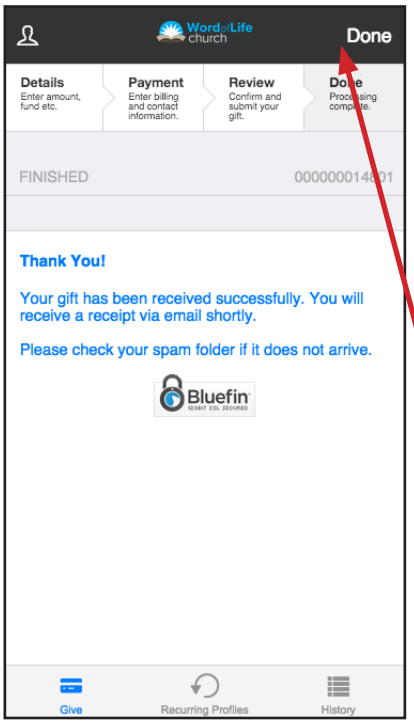
5. Once you've added all the gifts you'd like to, move on to the payment section.
6. Enter the *Card Number*.
7. Enter the *Expiration Month*.
8. Enter the *Expiration Year*.
9. Enter the *CSV code*.
10. Click CONTINUE.
11. At this point, you may review your online gift. If everything looks correct, click SUBMIT. If you need to make changes, click EDIT GIFT.

Enter credit card information, then tap Continue.





Review the gift information. Tap Continue.



Confirmation page is displayed. Tap Done to leave this page.